

OnPoint Document Manager

“OP-DOC”

Administrator Guide



ONPOINT

Revision #: 02 Contains updated screenshots to reflect 2019 edits	Date: 03/25/2020
Revision #: 01	Date: Summer 2009
Created by: OnPoint Documentation Team	

Table of Contents

1.0	Overview	1
1.1	Administration Features	1
1.2	User Features	1
1.3	Access & Management	2
1.4	OP-DOC Administrator Roles	3
1.5	Licensing.....	3
2.0	Document Administrator Functions.....	4
2.1	Menus	4
2.2	Tree Structures.....	5
2.3	Manage Delete Requests	10
2.4	Reports.....	11
3.0	Root Administrator Functions.....	12
3.1	Group-Based Menus	12
3.2	Configure Table Display	13
3.3	Configure Banner	14
3.4	Home Page Messaging.....	15
3.5	View Mobile UI.....	16
3.6	Show/Hide non-mobile documents	16
3.7	Clear Caches.....	16
3.8	Change Customer.....	16
3.9	Check Data Integrity.....	16
3.10	Top Ten Lists	17
4.0	Adding Documents to the Menu.....	18
4.1	Upload New Document.....	18
4.2	Upload Documents from ZIP.....	20
4.3	Create New Document.....	21
4.4	Req Delete Selection	23
4.5	Linking Documents to the LMS	23
5.0	Accessing/Editing Documents.....	24
5.1	View/Loading Documents.....	24
5.2	Additional Document Configuration.....	25
5.3	Edit a Document Record	27
5.4	Assign Document Access Permissions	28
6.0	Document Manager – Mobile.....	30

1.0 Overview

OnPoint's Advanced Portal option includes a full-featured document management module called "OP- DOC", designed for customers with more advanced document management requirements. This fully integrated document management application is used by OnPoint's LMS and CellCast customers to organize and manage a variety of electronic file types including documents, images, scans, PDFs, and spreadsheets, and serve them up to their users/partners/customers based on their assigned group security and system roles.

As part of a blended learning platform, the OnPoint portal and mobile interfaces allow users direct access to the OP-DOC application via a button or tile on the home page or a link in the menu, allowing them to access referential material from a set of drop-down menus or by using the search functionality. Documents can also be found from a standard or advanced search action.

All documents, when uploaded to the library, can have access security rights set up to ensure that stored materials are made available only to the appropriate users.

1.1 Administration Features

Administrators can take advantage of OP-DOC's key features including master document uploading, document linking, version control, and access tracking. Specific features include:

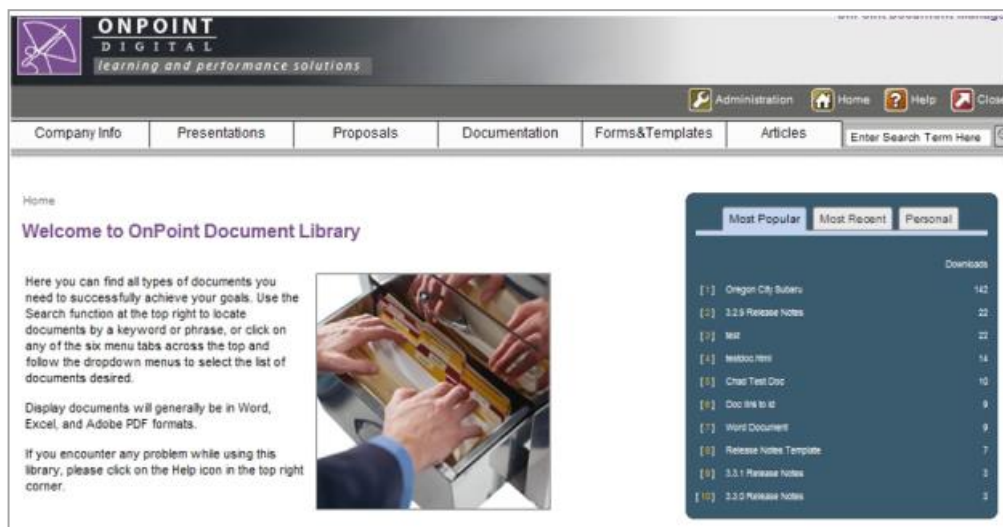
- Customizable landing page (text and graphic)
- Customizable tabs and drop-down selections so that the organization of and access to material is easily controlled
- Group Specific Tabs/Menu/Management
- Master document creation and relationships (linking)
- Version Control with Author notes
- Access permissions (read/write) by Role, by Group, and by Job Code
- User access tracking
- Mobile Yes/No configuration
- Object Metatags
- HTML editor for Welcome Page messaging and for updating stored HTML documents

Documents in the Library can also be linked to assets managed in the OnPoint Course Manager repository. Documents in OP-DOC can be referenced from an asset in the repository, so that as that item is updated in the Document Management system, the most updated version will automatically be included within any course that includes the referenced material.

1.2 User Features

Users can take advantage of the following key features:

- Search and advanced search capability from the UI/UX
 - Name, Description & Metatag Match
- Mobile OP-DOC for access via CellCast mobile apps
- Download/print options
- List of top ten most popular viewed by community
- List of top ten most recently viewed by community
- List of top ten most recently viewed by the user



1.3 Access & Management

All users and managers access Document Manager via their main portal (“OP-Portal”) or Mobile (“CellCast”) User Interface. The system will recognize the user’s primary group and present the appropriate Document Manager layout for their primary group membership.

Root Administrators (“RAs”) have the ultimate administrative rights over the Document Manager application and all group-based menus and tree structures that are created. Group-specific menus can also be created that are managed by a specific Document Administrator (“DAs”). A Document Administrator has the same rights as the Root Administrator, but only for the menu(s) they are assigned to manage. Each group-based menu must be created anew (not copied), and setup with a welcome page, defined banner, document tree structure, and a specific group assignment. This menu is then automatically presented to users who have that specific group set as their primary group.

A user or a manager in the system cannot see multiple document manager instances. They either see the main instance, or they see the instance assigned to their primary group. The Root Administrator is the only administrator level that has access to all instances of Document Manager.

Within each menu structure, be it the main menu or a group-based menu, each leaf of the menu and each document within the menu can have both read and write roles for Groups, system Roles, and Job Codes. Permissions are set for documents within the nodes and can be applied when documents are added to the system.

1.4 OP-DOC Administrator Roles

There are two primary administrator roles in the Document Management system:

- **Document Administrator** – Can perform all functions described in the following *Section 2 - Document Administrator Functions*, for any group-based menu they have been assigned to manage. [Note that Site Admins have all OP-DOC Document Administrator rights by default.]
- **Root Administrator** – Can perform all of the functions described in the following *Section 3 – Root Administrator Functions*, as well as access and edit all group-based menus, move between different customer slices (“Change Customer”), and perform deletion tasks.

These additional functions appear on the Administration page for Root Administrators only. The Group Based Menu Selection (click to manage) is found at the bottom of the page; here the Root Administrator can access the [Default Menu](#) and any other group-based menus that have been created. Use the [Change Customer \(Slice\)](#) tile within the Select Administrative Function to select a different slice which may have different Default and group-based menus defined.

1.5 Licensing

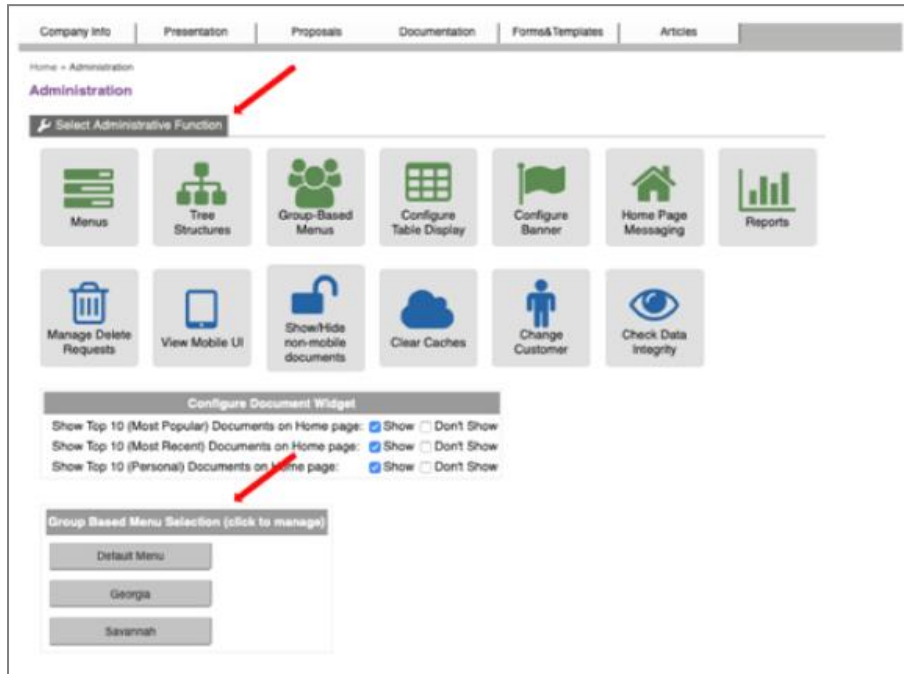
The Root Administrator role is the highest level of access available within the OnPoint LMS. It requires one OPLS Admin/Author license. Most organizations opt to forego this and allow OnPoint to set up the initial menu structure for them.

Document Administrator is a role defined for customers who have purchased OnPoint’s optional Advanced Portal application that includes the Document Management module. Document Administrator licenses require the one-time purchase of an OnPoint Admin/Author license for each named Document Administrator who will access OP-DOC.

Other LMS managers holding either an OnPoint Course Manager or Performance Manager license can be given access to OP-DOC for document “write” access only. Those with Write permissions will have the ability to add, delete or edit documents within the nodes of the menu structure but have no access to the Administration area of OP-DOC. [An [Edit](#) link is available for HTML documents.] See [Section 5—Accessing/Editing Documents](#) for more detail.

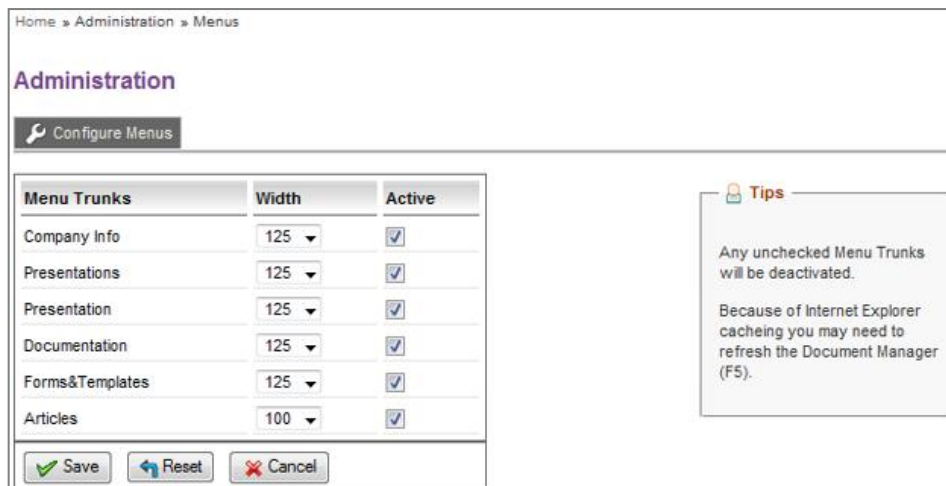
2.0 Document Administrator Functions

Click on the Administration link from the Document Library home page to access the main Administration page. From here, you can manage any menu you have manager rights for. Simply click on an Administrative Function tile, then click the menu selection of the menu you wish to manage if different from the Default Menu being displayed.



2.1 Menus

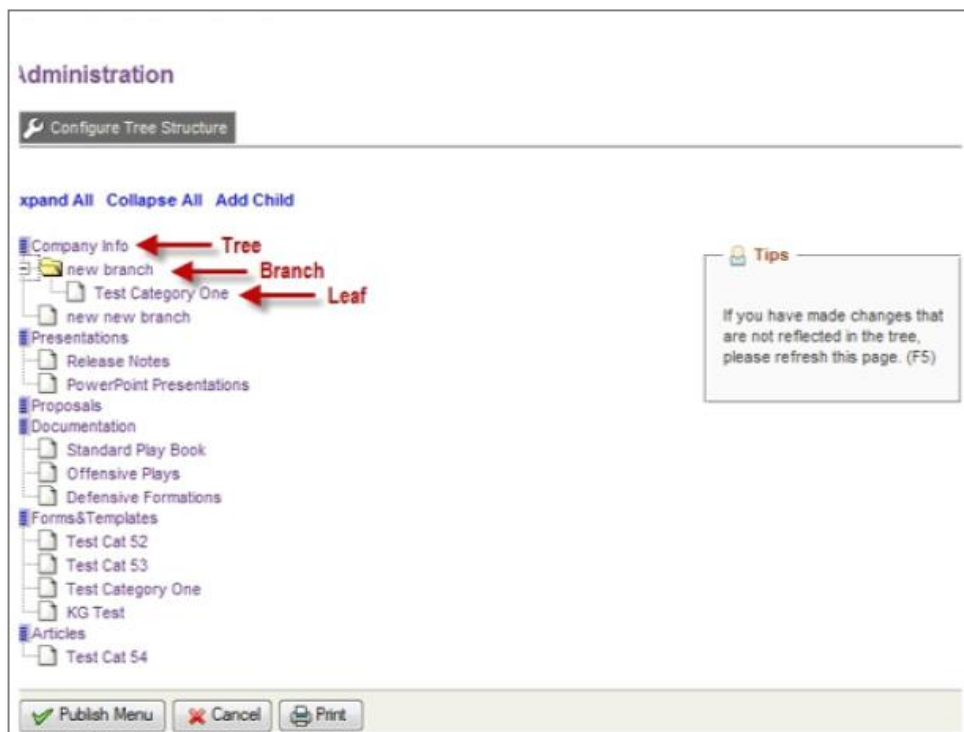
Click the [Menus](#) tile under the Administrative Functions area to set the desired width of the main menu tabs ("Trunks") as well as their Active or Inactive status. These menu tabs are the Root Nodes created within the Tree Structures area. Editing the text of each would be done in that area.



The system comes with five (5) defined Menu Trunks that serve as placeholders only, and the default menu tab width is 125 pixels. The minimum tab width is 65 pixels. The purpose of the Active checkbox is to allow an Administrator to keep a Trunk defined but Inactive so that changes/updates may be made without any users accessing any items associated with that Trunk. If a Trunk is defined but set as Inactive here, the menu tab will still display to the user, but no assigned items will be displayed.

2.2 Tree Structures

Tree structures are accessible by a Root Administrator, or by the Document Administrator for their specific group-based menu. Click the [Tree Structures](#) tile under the Administrative Functions area to build and manage the menu tree structure.



Each menu is built from one or more main “Trees”. Trees can have Leaves and/or Branches. Branches are menu items that branch out to other menu items. Branches can branch to other branches, but ultimately must end at a Leaf. A Leaf is the document list where documents can be added. Branches and leaves are created from a main tree. Simply click on any menu node (tree, branch or leaf) to open that node and see its details.

2.2.1 Add a Leaf Node

A leaf node can be added to any tree or branch. Click on any menu node (tree branch or leaf) and click the [Add a Leaf Node](#) button. Once a leaf has been created, it can then be accessed and then defined as a leaf or a branch. If the node is a branch, another leaf node must be added to the branch.

Administrative Functions

Menu Node Tree: Edit

+ Add a Leaf Node

Node ID: 12

Parent ID: 0

Node Name: Presentations

Node Type: Branch

URL / Subtitle: subtitle

Sequence: 40

Order: no change move up move down Delete Node (and all sub-Nodes) Enter 'delete' to confirm Node deletion.

move to top move to bottom

Save Cancel

Tip
Root nodes may be edited in the 'Configure Menu' section.

Once a leaf has been created, it will default to being a document list. Alternatively, the leaf can be set as an External URL which will open a URL in the frame of the document manager when a user selects that leaf from the menu.

Administrative Functions

Menu Node Tree: Edit

Node ID: 0

Parent ID: 47

Node Name:

Node Type: Leaf

URL / Subtitle: /opdoc/jsp/document.jsp?doccatId=0 document list External URL Preview URL

Sequence: 30

Save Cancel

2.2.2 Copy a Node

From the Administrative Functions area, select the **Tree Structures** tile to display the tree structure being managed. Select the menu node you wish to copy, and the Menu Node Tree: Edit page will appear. [Note: This will not appear for root-level nodes: no Copy function is available for root nodes.]

Select the [Copy Node](#) button. A new page will appear with a drop-down box that lists all of the available menu nodes that this node can be copied into. Only the root nodes and any available branch nodes are available nodes to copy a node into, Select the node to be copied into from the drop-down list and then click [Save](#).

Making a copy of a node will copy it to the new branch or root node and all links to documents within that node to the newly created leaf. All documents in any new leaves will be created as reference documents to the original file: therefore, if the original is edited then that edit will be reflected in all the references to that original.

2.2.3 Move a Node

From the Administrative Functions area, select the [Tree Structures](#) tile to display the tree structure you are currently managing. Select the menu node that you wish to move and the Menu Node Tree: Edit page will appear. [Will not appear for root-level nodes-use Up/Down options for ordering root nodes.]

Select the **Move Node** button. A new page will appear with a message stating you are moving the particular node and all its contents. A drop-down box is provided that lists all the available menu nodes that this leaf node can be moved into.

Only root nodes and any available branch nodes are node types to move a node into. Making a move of a leaf node will move the entire node to the new branch or root node.

Select the root or branch you would like to move the selected node into, then click the **Save** button.

A confirmation box will appear to confirm the move action. Select Okay. You will be returned to the tree structure. Any changes to the tree structure will not take effect for users until the tree menu has been published. Use the **Publish Menu** button at the bottom of the tree structure to publish the menu. This will return you to the Document Manager Administration page. Be sure to refresh the page or select the Home button in order to see the changes.

2.2.4 Set Permissions

Each leaf has an option to set permissions on that leaf. The Set Permissions action is used to designate which system roles, groups, and job codes have the ability to access the document list (“read”), or to add or make changes to the documents in the list (“write”). Rather than setting access permissions at the individual document level for every document uploaded to the library, most organizations prefer to establish access permissions at the menu level instead-allowing those settings to govern all documents within a particular node of the menu.

Administration

Menu Node Tree: Edit

Node ID: 19

Parent ID:

Node Name:

Node Type:

URL / document list External

Subtitle:

Sequence:

Order: no change

 move up

 move down

 Delete Node (and all sub-Nodes) Enter 'delete' to confirm Node deletion.

 move to top

 move to bottom

Tips

If you select 'Copy Node' or 'Move Node', the next branch node you click on the tree will be the target node.

Click the [Set Permissions](#) button in the upper left of the page. The Edit Access Permissions page will appear.

Administration

Menu Node Tree: Edit

Node ID: 19

Parent ID:

Node Name:

Node Type:

URL / document list External

Subtitle:

Sequence:

Order: no change

 move up

 move down

 Delete Node (and all sub-Nodes) Enter 'delete' to confirm Node deletion.

 move to top

 move to bottom

Tips

If you select 'Copy Node' or 'Move Node', the next branch node you click on the tree will be the target node.

Use the Assign buttons to the right of each section. Note that fields left blank allow all roles, groups or job codes to have access.

- Read Roles – define which system roles can see/download documents in the document list for the specified node



Note: System roles that can be selected include two User roles (Learner, User), two Performance Manager roles (Reporting Manager, Group Manager), three Admin/Author roles (Course Coordinator, Content Administrator, Event Manager), and one OP- DOC role (Document Administrator). This represents all system roles except Record (an archived user role), and Root Administrator – which can access all functions. Site Admins have all Read/Write access by default, and access to all Document Administrator tiles, but no access to Root Administrator tiles.

- **Read Groups** – define which groups can see/download documents in the document list for the specified node; all members of the defined group will inherit permissions.
- **Read Job Codes** – define which job codes can see/download documents in the document list for the specified node.
- **Write Roles** – define which system roles can create/edit documents in the document list for the specified node. This selection will default to include CA/CC/EM/GM/RM.
- **Write Groups** – define which groups can create/edit documents in the document list for the specified node; all members of the defined group will inherit permissions.
- **Write Job Codes** – define which job codes can create/edit documents in the document list for the specified node.

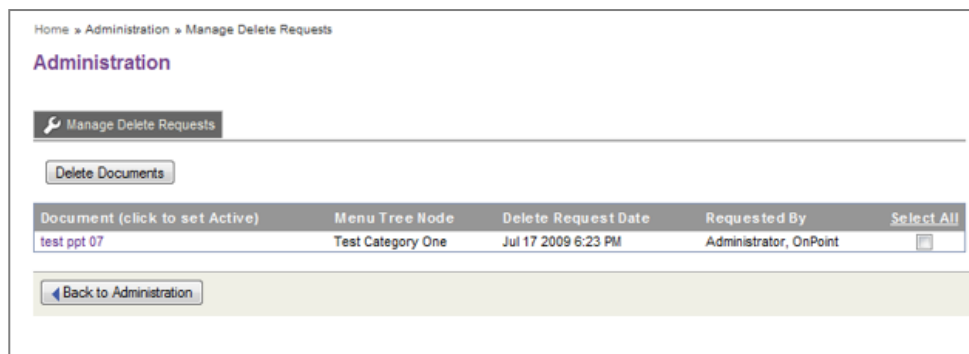
2.2.5 Publish the Menu

Once the menu tree structure has been created, remember that no changes will take effect until the menu has been published. Selecting the **Publish Menu** button at the bottom of the Document Tree Structure will publish the updated menu and return you to the Administration page. Refresh the page in order for the menu tree updates to be viewable. Click the Administration or Home icon in the upper right, or use your browser's refresh icon.

2.3 Manage Delete Requests

From any document list, a manager can mark one or more documents for deletion; simply click the Select checkbox to the right of the document(s) to delete, then click the **Req Delete Selection** button. You will be asked to confirm your request. Click Okay and the document(s) will be removed from the displayed list.

A Root or Document Administrator can then select **Manage Delete Requests** tile from the main Administration page.



Click the Select checkbox next to any specific item(s), then the [Delete Documents](#) button to delete the item(s) from the system. [Click the [Select All](#) link to mark all the documents listed.] The deletions will be recorded in Course Manager's main Deletions Audit Trail under the Administration tab.

2.4 Reports

There are several Document Manager reports that can be accessed and run by a Root Administrator, by a Document Administrator for a specific Group-based menu, or by a Site Administrator or Content Administrator.

Home » Administration » Run Reports

Reports

[Run Reports](#)

Report	Description
Document Downloads	Document download statistics filtered by menu node.
Master Document Creation	List of master documents filtered by creation date
Master Document Downloads	Master Document download statistics filtered by node. Referencing documents will be shown, preceeded by '->'
Annual Downloads Report	Download statistics by month and year.

[Back to Administration](#)

3.0 Root Administrator Functions

Click on the Administration link from the Document Library home page to access the main Administration page.

3.1 Group-Based Menus

This option is controlled by the Root Administrator. Click the [Group-Based Menu](#) tile on the Administration page to create menus, assign a specific group, and assign one or more Document Administrators.

The screenshot shows the 'Configure Group-Based Menus' page. At the top, there is a breadcrumb trail: 'Home » Administration » Configure Group-Based Menus'. Below this is the 'Administration' header and a 'Configure Group-Based Menus' button. There are three buttons: 'Add/Remove Group', 'Return to Default Group', and 'Default Menu Administration'. A table lists the groups and their administrators:

Group (click to manage)	# of Members	Document Administrator(s)
101 Introduction to Prolance	2	John Abraham [assign]
ABC Acura	7	John Abraham [assign]

At the bottom, there is a 'Back to Administration' button.

There can only be one menu per defined group in the OnPoint LMS, though you may assign multiple Document Administrators to the group. Additionally, any menu can be managed by the Root Administrator. Use the [\[assign\]](#) link to the right of the Document Administrator(s) listed for a particular group in order to assign one or more administrators to a group-specific menu.


The screenshot shows the 'Group Administration' page. At the top, there is a breadcrumb trail: 'Home » Administration » Group Administration'. Below this is the 'Administration' header and an 'Add/Remove Group' button. There is a 'Finished' button. Two panels are visible: 'Assigned Group (click to remove group)' and 'Available Groups (click to add group)'. The 'Assigned Group' panel contains '101 Introduction to Prolance'. The 'Available Groups' panel contains a list of groups: '102 Business Process management and Workflow', '103 Navigating Prolance', '50Below', '@Road Evaluation Group', 'ABC Acura', 'AFC', and 'All Users'.

Click the [Add/Remove Group](#) button at the top left of the Configure Group-Based Menus page.

You can then assign an existing user group from the available list on the right. The selected group will move to the left. To remove a group assignment, click on the group assigned on the left, and it will move back to the available list on the right. Click the **Finished** button to save your selection. Once the assignment is made, the number of members (users and/or managers) in that group will display in the # of Members column.

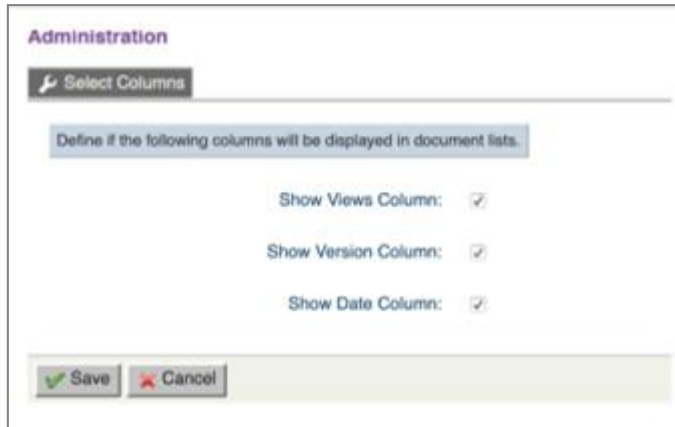
- Click the **Return to Default Group** button if you want to reset the system to manage the Default Group for the customer slice you are in.
- Click the **Default Menu Administration** button to assign one or more Document Administrators to manage the default menu.
- Click on an available name on the right. The selected administrator will move to the left. If you are removing an administrator, click on the name assigned on the left, and it will move back to the available list on the right.
- Click the **Finished** button to save your selections.



 **Tip:** If Document Administrator “ABC-Tester” is assigned to manage 3 different group-based menus, they will see the default menu for their primary group when they first login to the portal and access the Document Library link. Based on their role as a Document Administrator, they will see the Administration link. When they click that, they will be able to use the Menu Selection area to select the menu they wish to manage.

3.2 Configure Table Display

Use this area to define if specific column data should be displayed or not displayed in document lists on leaf nodes.



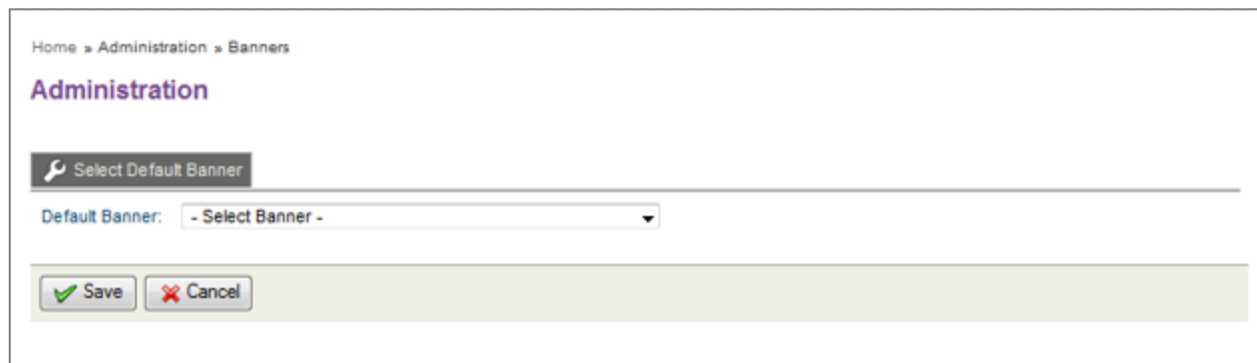
[Show Views Column](#): the number of user views (not unique users, but total times viewed).

[Show Version Column](#): what version the document is.

[Show Date Column](#): the creation date of the file (if it's the first version), or the updated date of the file (if it is being re-versioned).

3.3 Configure Banner

This option allows you to change the banner for the Document Management system. The banner selected here must already exist in the OPCM (Course Manager) banners list.

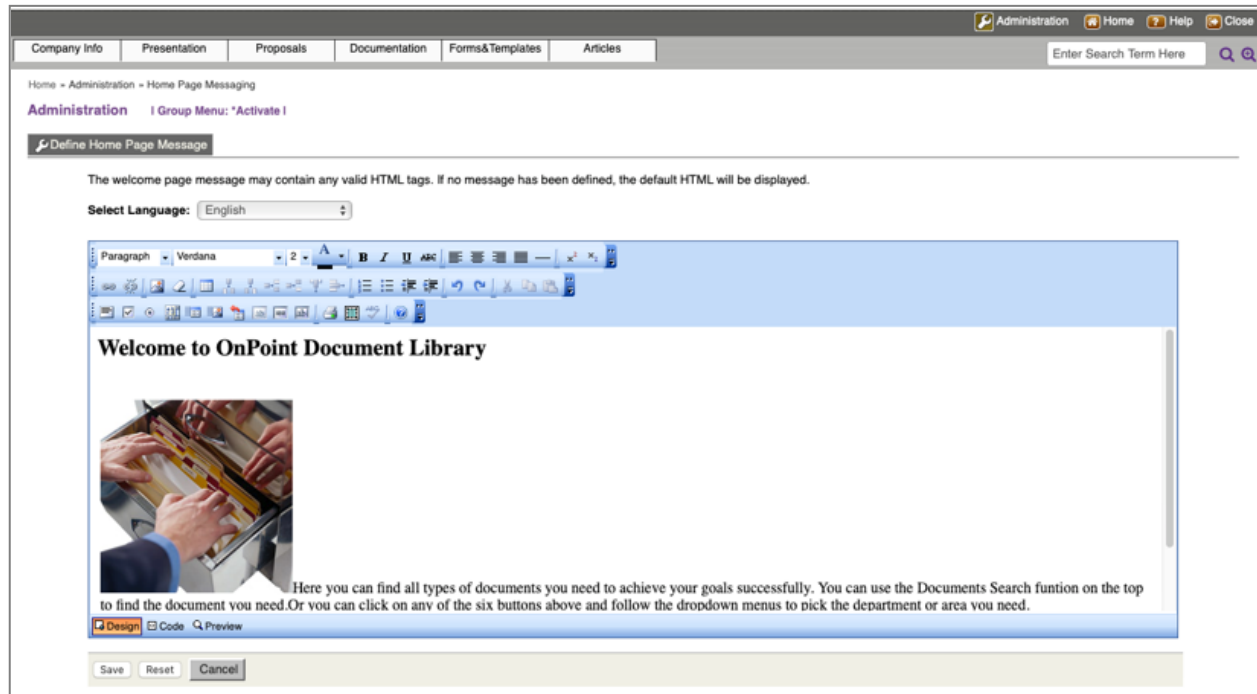


A banner can be selected for the main (Default) Document Manager menu, as well as for any group-based menus. To define a banner for a specific group-based menu, from the Administration page, click the menu you wish to manage from the Group Based Menu Selection choices. Once the screen refreshes, click the [Configure Banner](#) tile to define the banner for that particular group-based menu, and the Select Default Banner page will open. Select the banner from the drop-down list. Again, the banner selected here must already exist in the OPCM (Course Manager) banners.

Click the [Save](#) button to continue, or the [Cancel](#) button to cancel the action and return to the Administration page.

3.4 Home Page Messaging

From the Administration page, click the [Home Page Messaging](#) tile to create the welcome page message that appears to users when they log into Document Manager. Simply type in your message, or use the HTML Editor to assist in formatting the message as desired.



Click the [Save](#) button to save your entries and return to the Administration page

Click the [Reset](#) button to remove any updates you've just made to the message, but leave you on the page to resume editing.

Click the [Cancel](#) button to ignore any updates just made, and return you to the Administration page.

In addition to the main (Default) menu, a unique welcome page can be defined for any group- based menu that is created. To define a welcome page message for a specific group-based menu, from the Administration page, click the menu you wish to manage from the Group Based Menu Selection choices, then click the Home Page Messaging tile to define the message for that particular group-based menu. Images can be added and positioned directly into the html code. Use the html editor's preview function to review your desired layout before saving it.

3.5 View Mobile UI

The [View Mobile UI](#) tile on the Administration page provides a link to the mobile version of OPDOC. This is used to confirm that you are seeing the mobile items as expected. Only items with Mobile = Yes will appear.

3.6 Show/Hide non-mobile documents

The [Show/Hide non-mobile documents](#) tile on the Administration page lets you define if within the Mobile OPDOC, all items should be shown in the lists, however only items with Mobile = Yes will be accessible.

3.7 Clear Caches

Used primarily by the OnPoint team in a support capacity, the [Clear Caches](#) tile on the Administration page provides an option to clear user cache for the OPDOC page and request the page reload fully. Doing this can help ensure changes to the environment are refreshed fully after making certain changes.

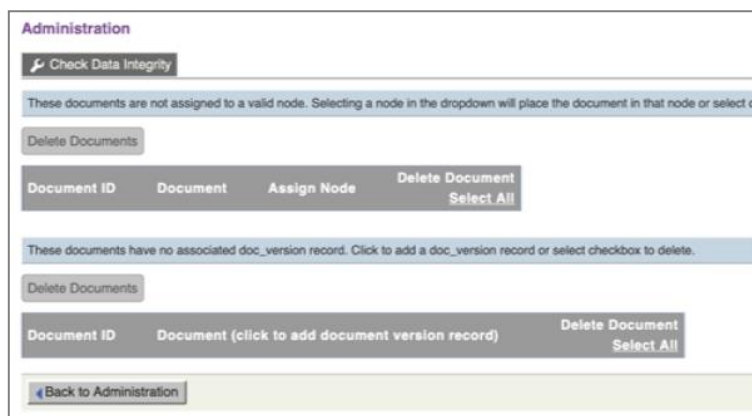
3.8 Change Customer

Clicking the [Change Customer](#) tile from the main Administration page returns you to the list of supported customer slices. This button displays to Root Administrators only.

3.9 Check Data Integrity

The [Check Data Integrity](#) tile provides for the running of specific processes to look at all documents and confirm they are connected to a node. If nodes are missing you can connect or delete the document as desired from this page.

This page also reviews documents that do not have associated document version information. Here you can add the missing information or delete the documents as needed.



3.10 Top Ten Lists

There are three “Top Ten List” options relating to the popularity of viewed documents:

- **Top Ten Most Popular** – lists the top ten most frequently viewed documents by users within this particular menu group
- **Top Ten Most Recent** – lists the ten most recently uploaded documents to this particular menu
- **Top Ten Personal** – lists the ten most recent documents viewed by the user

A Root Administrator can click the checkboxes to Show or Don't Show to indicate which options should be displayed to users on their OP-DOC home page.

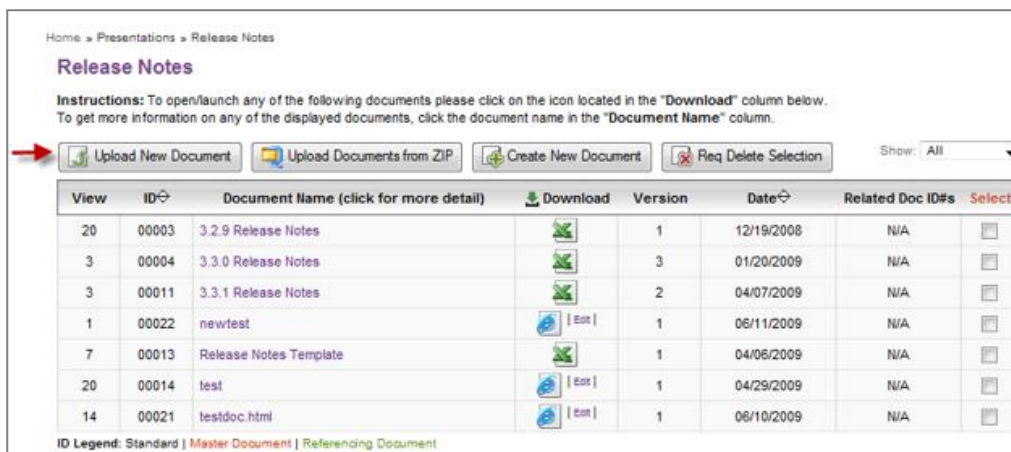
4.0 Adding Documents to the Menu

Once you have created and published a defined menu using the Tree Structures area, you can begin adding documents. Select the specific menu drop down (“trunk”) and subsequent branch and/or leaf where you would like to add documents. Documents can only be added to a Leaf.



As long as you are a role that allows you to “write” to that particular menu, you should see four action buttons along the top of the document list (see **Section 2.2 – Tree Structures** for more details about menu-level permissions). If you only have “read” rights, you will not see these.

Note: if you have a scenario where you don’t want *all* PMs to have “write” access, you can create a group of just those managers you wish to have these permissions, then use that group to set write access for.



4.1 Upload New Document

Click the **Upload New Document** button to upload a single document or item to the document list.

Upload New Document

Document Name:

Description:

Upload File: No file chosen

Or Master Doc ID#:

Related Doc ID#:
Enter Doc ID#s separated by commas

Assign Learning Nugget:

Is Mobile:

Complete the following fields:

Document Name:	Enter the name of the document to be displayed in the list.
Description:	Provide a description of the document. In addition to the Document Name field, this field is used to help in document searching, so you may want to include any applicable keywords.
Upload File:	Click the Choose File button to locate the file from your local computer or network server.

Click **Save** to upload the file.



Very Important Note: If the document filename already exists in the system, the option to overwrite or make a new version will appear. **Overwriting** will overwrite the previous document where it currently resides on the server. This will not create a new version, nor will it place the document in the menu where you currently are adding documents. **Adding** a new version will increment the version of the document where it currently exists; again the document will not be created in the menu where you currently are because this same document exists elsewhere in the menu.

Or Master Doc ID#:	As an alternative to uploading a new file, you may specify a Master Document instead. If you chose the Upload File's Choose File option only to find that the document already exists in the menu system elsewhere, it is best to find the document number of that original document and enter that ID as the Master Doc ID#. Once you have entered the Master Doc ID#, click the Find File button. This will confirm the document exists and copy any pertinent information to the new instance of the document. You have now created a "Reference" document. The master / reference document scenario allows for one document to be uploaded but used in several menu systems. When the Master Document is versioned or overwritten, then that is reflected in all instances of that document throughout the Document Manager application.
Related Doc ID#:	Enter any related document id numbers here that you may wish to show to users in the document list. If an ID# is provided, the user can click on the [View] link to open a list of related documents. If you have more than one, be sure to enter the ID numbers separated by commas.
Assigned Learning Nugget:	This is a legacy item which is no longer supported.
Is Mobile:	Options are Yes/No. If Yes then the item will be available in the Mobile Document Manager if made available to your users. If No then the item will only be made available to those when accessing Document Manager via the Portal via a standard browser. This setting is designed to ensure that file types that you know will not open if viewing on a mobile device are restricted from appearing in the mobile OP-DOC lists.



Tip: Default permissions will be applied once the document has been saved to the repository. Newly added documents are governed by the access permissions of the leaf they are being assigned to. You may then go into the saved document and *add* to these permissions, though you cannot take away inherited permissions set at that leaf level (see **Section 5.4 – Assign Document Access Permissions**).

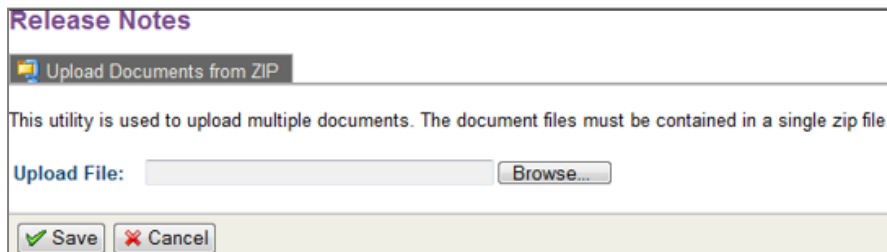
4.2 Upload Documents from ZIP

If you have a group of documents to upload, zip them up and use the **Upload Documents from Zip** feature to import them all into a specified leaf.

Click the **Browse** button to locate the file from your local computer or network server. Once the

zip file has been selected, click **Save** to continue. All documents in the zip file will now be shown, giving you the ability to refine the Document Name (a default entry is made for each file) and add a description. Note that you must have a Document Name in order for the document to be added successfully.

When you click the **Save** button again, all the documents will be added to the menu node you are in.



Release Notes

Upload Documents from ZIP

This utility is used to upload multiple documents. The document files must be contained in a single zip file.

Upload File: **Browse...**

Save **Cancel**



Release Notes

Upload Documents from ZIP

Target zip file: SampleAgreements.zip

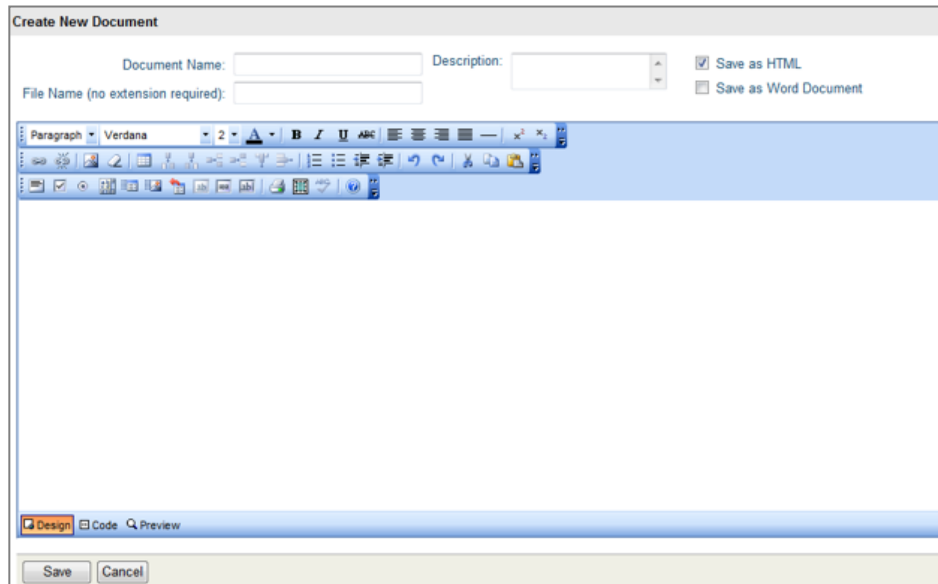
A default Document Name has been created. You may edit the Document Name and add a Description as desired.
Note: A file without a defined Document Name cannot be successfully added to the repository.

File Name	Document Name	Description
OnPoint_License_Agreement-010109.doc	OnPoint_License_Agreement-010109	
Portal_Use_Agreement-Master-012009.doc	Portal_Use_Agreement-Master-012009	

Save **Cancel**

4.3 Create New Document

Clicking on the **Create New Document** button lets you create an HTML or Word document directly within the document management system.




Use the built-in HTML editor to create an HTML or Word document by completing the following fields:

Document Name:	Enter the name of the document to be displayed in the list.
Description:	Provide a description of the document. In addition to the Document Name, this field is used to help in document searching, so you may want to include any applicable keywords.
File Name:	Enter the file name that the new file will be saved as. A file extension is not required; depending on whether you select to Save as HTML or Word (.doc), the extension will be added for you.

Click a checkbox to Save as HTML or to Save as a Word Document.

Click **Save** to continue. Your new document will now be accessible from the menu node.



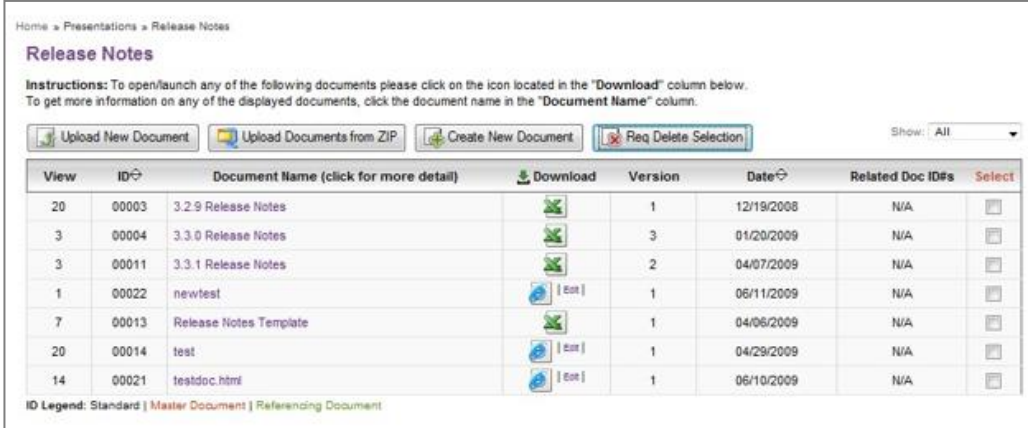
Tip: If you plan to cut and paste content from Word or another HTML document into the editor, use a notepad or other cleaner tool to remove excess HTML or hidden formatting code beforehand to minimize formatting problems.

Editor tools include:

- Design – this is the default view within the editor
- Code – click to reveal all HTML code
- Preview – to display the final view

4.4 Req Delete Selection

To remove any items from a menu node, click the Select checkbox in the far-right column then click the [Req Delete Selection](#) button. This selection is only available to managers with Write access to that particular document.



Home » Presentations » Release Notes

Release Notes

Instructions: To open/launch any of the following documents please click on the icon located in the "Download" column below. To get more information on any of the displayed documents, click the document name in the "Document Name" column.

Upload New Document | Upload Documents from ZIP | Create New Document | **Req Delete Selection** | Show: All

View	ID	Document Name (click for more detail)	Download	Version	Date	Related Doc IDs	Select
20	00003	3.2.9 Release Notes		1	12/19/2008	N/A	<input type="checkbox"/>
3	00004	3.3.0 Release Notes		3	01/20/2009	N/A	<input type="checkbox"/>
3	00011	3.3.1 Release Notes		2	04/07/2009	N/A	<input type="checkbox"/>
1	00022	newtest	Edit	1	06/11/2009	N/A	<input type="checkbox"/>
7	00013	Release Notes Template		1	04/06/2009	N/A	<input type="checkbox"/>
20	00014	test	Edit	1	04/29/2009	N/A	<input type="checkbox"/>
14	00021	testdoc.html	Edit	1	06/10/2009	N/A	<input type="checkbox"/>

ID Legend: Standard | Master Document | Referencing Document

The document will be removed from the active list, and marked for a Root Administrator to delete. All deletions are logged with a date/time stamp.

4.5 Linking Documents to the LMS

In the event that you have created a document in the library that you wish to include in an online course, simply record the Document ID for the particular document. When you create the single file asset in the Course Manager database, you will utilize a "Document Inline" or "Document Link" type asset, and enter the Document ID number you want to reference. Then, regardless of what courses this Asset may be assigned to, should the document version be updated, the online course will also be updated – as the link will pull the most current version of the document from the library.

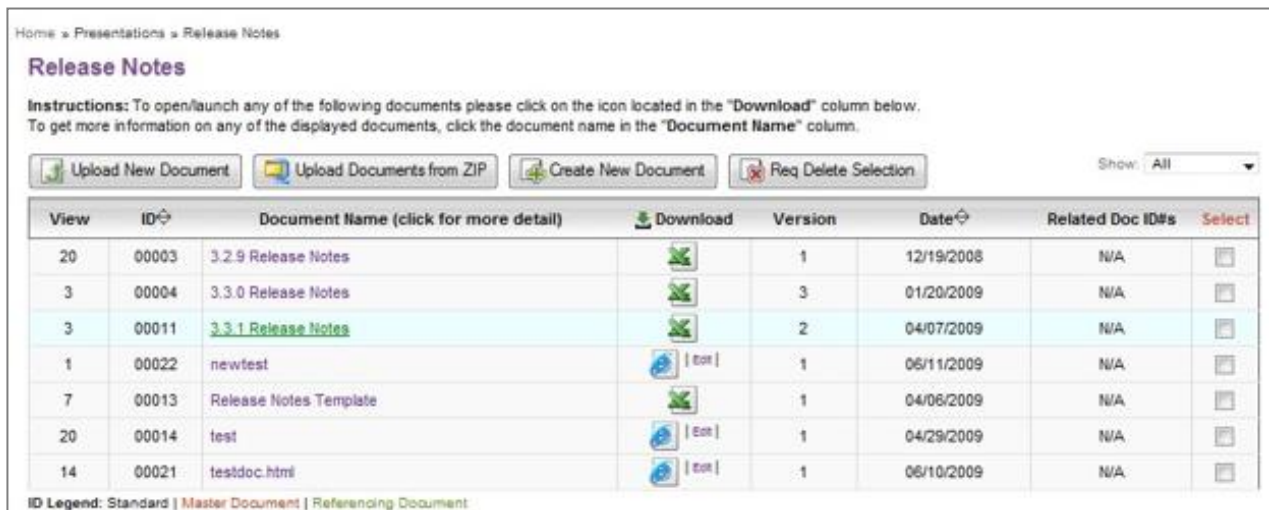
5.0 Accessing/Editing Documents

5.1 View/Loading Documents

To access a document, you can search by title or description in the header bar's search box, or navigate directly to the item via the menu system drop-downs.

Once you are at the document list, there are two ways to access a document

(1) Click on the document's application icon in the Download column; the document type will determine how the document opens (i.e. with what program).



The screenshot shows a web interface for document management. At the top, there is a breadcrumb trail: Home > Presentations > Release Notes. Below this is the title "Release Notes" and a set of instructions: "Instructions: To open/launch any of the following documents please click on the icon located in the 'Download' column below. To get more information on any of the displayed documents, click the document name in the 'Document Name' column." There are four buttons: "Upload New Document", "Upload Documents from ZIP", "Create New Document", and "Req Delete Selection". A "Show: All" dropdown menu is on the right. Below the buttons is a table with the following columns: View, ID, Document Name (click for more detail), Download, Version, Date, Related Doc ID#s, and Select. The table contains seven rows of data. The third row, "3.3.1 Release Notes", is highlighted in light blue. Below the table is an "ID Legend" with three items: Standard, Master Document, and Referencing Document.

View	ID	Document Name (click for more detail)	Download	Version	Date	Related Doc ID#s	Select
20	00003	3.2.9 Release Notes		1	12/19/2008	N/A	<input type="checkbox"/>
3	00004	3.3.0 Release Notes		3	01/20/2009	N/A	<input type="checkbox"/>
3	00011	3.3.1 Release Notes		2	04/07/2009	N/A	<input type="checkbox"/>
1	00022	newtest	Edit	1	06/11/2009	N/A	<input type="checkbox"/>
7	00013	Release Notes Template		1	04/08/2009	N/A	<input type="checkbox"/>
20	00014	test	Edit	1	04/29/2009	N/A	<input type="checkbox"/>
14	00021	testdoc.html	Edit	1	06/10/2009	N/A	<input type="checkbox"/>

ID Legend: Standard | Master Document | Referencing Document

For HTML documents, an [\[Edit\]](#) link next to the document's application icon will display for any Managers who have "write" access to the document, allowing them to edit the document. Click the application icon to simply download the file. Click the [\[Edit\]](#) link to open the document with the html editor in order to make changes to the document.

(2) Click on the title of the document, which will open an information page with additional detail; you may then download the document from there using the [Download File](#) button at the bottom left.

Home » Articles » Documentation » Forums (#18)

Forums


i Document Information

Menu Node: **Forums** [[Change Menu Node](#)]

Document Name: **Sample Certificate Background**

Description: **Test**

Version: **1** [[Add New Version](#)] [[View Version History](#)]

File Type:  (Image)




Associated Learning Nugget:

Related Doc ID#s:

Downloads: **1** [[View Download Details](#)]

Is Mobile: **No**

Document Meta Tags: [View/Edit](#)


 Launch  Edit  Back

5.2 Additional Document Configuration

As a manager of the menu system, you will see several other options on the Document Information page, including:

5.2.1 Change Menu Node



Click the [[Change Menu Node](#)] link to change the menu node assignment for the document, allowing you to easily move a document from one menu node to another.

 Change Menu Node

Document Name: **3.3.1 Release Notes**

Menu Node: **Release Notes**

Move to Menu Node:

5.2.2 Add New Version

Click the [\[Add New Version\]](#) link to add a new version to the document, which increments the document's file name and lets you upload a new version.

The screenshot shows a dialog box titled "Add New Version" for the document "Game Based Learning". It contains the following fields and buttons:

- Document Title:** A text box containing "Game Based Learning".
- File Name:** A text box containing "Game_Based_Learning.pdf".
- Add a Comment:** A text area with a vertical scrollbar.
- Upload File:** A text box with a "Browse..." button next to it.
- Buttons:** At the bottom, there are two buttons: "Perform Versioning" (with a green checkmark icon) and "Cancel" (with a red X icon).

Use the [Add a Comment](#) field to enter any version-specific comments that are relevant.

Click the [Perform Versioning](#) button. The Document Name stays the same. All versions remain on the server and are still accessible from the version dropdown.

5.2.3 View Version History

Click the [\[View Version History\]](#) link to see a list of all the versions created to date for the document; details include Manager Name, Date Created, and any Comments.

The screenshot shows a table titled "Version History for '3.3.1 Release Notes'". The table has five columns: Version, Manager ID, Manager Name, Date Created, and Comment. It contains two rows of data.

Version	Manager ID	Manager Name	Date Created	Comment
1	00001	Administrator, OnPoint	04/03/2009	
2	00001	Administrator, OnPoint	04/07/2009	

Close Window

5.2.4 View Download Details

Click the [\[View Download Details\]](#) link to see download details for the document, including who downloaded the file (User ID, First Name and Last Name) and the Download Date.

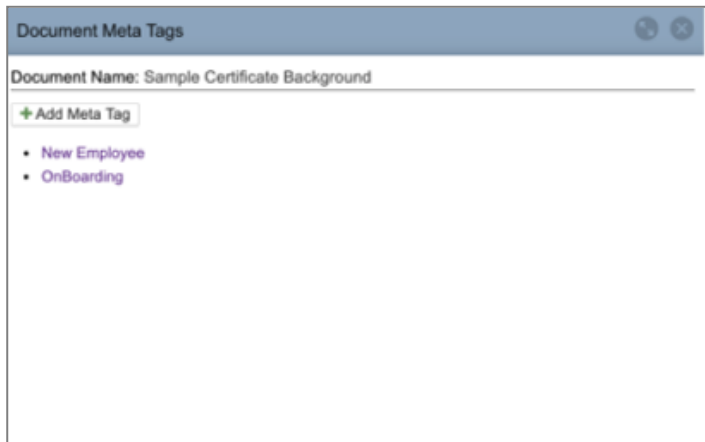
Downloads for '3.3.1 Release Notes'			
User ID	First Name	Last Name	Download Date
01238	Pat	Saltsman	04/14/2009
00001	OnPoint	Administrator	04/07/2009
00001	OnPoint	Administrator	04/07/2009

1-3 of 3 listed

[Close Window](#)

5.2.5 View/Edit Meta Tags

Click the **View/Edit** link next to Document Meta Tags field to define metatags for items in the Document Manager. These metatags help users locate items when using Standard and Advanced Search utilities. Search results are based on words and phrases found in document titles, descriptions and metatags; metatags help provide relevancy to return more accurate results in a user's search performed from the Portal or Mobile interface.



5.3 Edit a Document Record

To edit an existing document, click the **Edit** button at the bottom of the Document Information page.

You will see the following fields:

Document Name:	The name displayed in the Document List, to users.
Description:	Descriptive text that displays within the Document Information page.
Version:	Automatically entered value.
View Historic Versions:	Allows you to set whether or not users can view prior versions of the document.
Related Doc ID#s:	Enter any related documents you want users to be able to see listed and accessed if desired.
Associated Learning	Legacy Functionality (no longer supported)

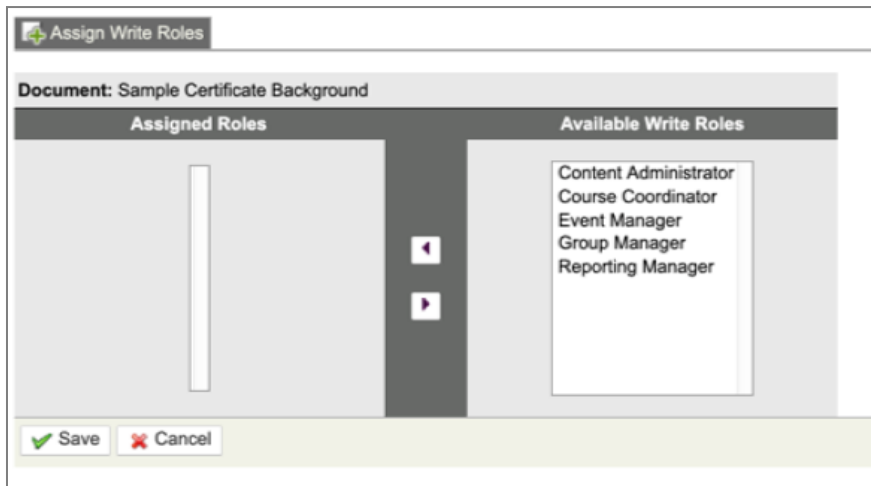
Nugget:	
Is Mobile:	Set object to be viewable via Mobile Document Manager interface on mobile devices.

5.4 Assign Document Access Permissions

In addition to editing items such as the Document Name and Description, administrators can specify unique read/write access permissions for each document. From the Document Information page, click the Edit button to reach the Access Permissions area. Use the **Assign** buttons to the right of each selection to assign the desired permissions.

Access Permission fields include:

Read Roles:	Set the permission to see/download a document in the list, by the user's defined system role
Read Groups:	Set the permission to see/download a document in the list, by the user's defined group membership.
Read Job Codes:	Set the permission to see/download a document in the list, by the user's defined job code.
Write Roles:	Set the permission to edit a document in the list, by the user's defined system role.
Write Job Codes:	Set the permission to edit a document in the list, by the user's defined group membership.



All Assign buttons open a screen to make selections from one column and transfer it to the other; click the appropriate arrow to move the selection one way or the other.

Click the [Save](#) button to save your selections and return to the Document Edit page. Your new selections will be displayed.



Note: When setting permissions by Role, you may give Read permission to any user role in the system, including Learners and Users. When setting Write permissions, only manager-level roles can be selected. Permission fields left blank give permissions to all available roles, groups, or job codes. Write permissions are only allowed for Performance Managers and above.

6.0 Document Manager – Mobile

Document Manager Mobile view is designed for viewing mobile-friendly documents and does not provide support for any Write Roles or management of documents within Document Manager. All Document Administration tasks should be done online.

For customers with custom interfaces, please contact OnPoint to discuss updating your CellCast mobile apps to support the mobile version of OP-DOC.

