

How to use the Document Management System

GNECsis has a feature that allows you to add in documents for persons and classes into the system in various areas. This allows documents to be tied to specific people and/or classes. It also has the capability for faculty and students to upload documents in their portals. It is available in the following locations:

- Admissions/Prospects in the document section of the Admissions button.
- Academics/People
- Academics/Students in the document sections of the Academics button.
- Academics/
- Academics/Instructors
- Academics/Classes in the document section of the Additional Info button.

This is a new function that will be added to in terms of features and locations in coming revisions to the system as time allows and requests are made.

One issue to note, is that right now if you try to upload a file that is too big (greater than 45MB) it will give you a timeout error. This error will be trapped by the next release.

Configuration of the Category

Each document has to have a category assigned to it along with a title. The category defines where the document should be viewable. In addition, in the student and faculty portals, it determines if a student or faculty person can upload a document or not.

You add new categories by going to System Administration/Tools/Document Management Categories. If you click on New, you will be given the chance to create a new one.

Here is an example of a category addition:

System Administration > Tools > Category

Category Name Curriculum Vitae

Admin/Prospects

Prospects

Admin/Academics

Students Classes Instructor People

Portals

Student Student/Add Instructor Instructor/Add

Save Return

In this example, the category name will be Curriculum Vitae and it will be able to have documents attached to it in the Instructors area of Academics. In addition, faculty can see their own documents uploaded to this category and also are able to upload their own documents since the Instructor/Add checkbox has been checked. The document will not appear in any of the other areas unless it is changed later to be visible in those areas.

A few things to note:

1. In the staff portal, any user with access to the area is able to see documents in that area and upload them. Only the categories that are allowed for the area will be available when adding a new category.
2. For the student and instructor portals
 - a. If only the Portals/Student or Portals/Instructor boxes are ticked, the student or instructor will just be able to see the documents in that category.
 - b. If the Student/Add or Instructor/Add box is ticked, that will allow a student or instructor to upload a document using that category.
 - c. The student or instructor is only able to update or delete items that they have personally uploaded using their available categories. Documents uploaded by others will not be able to be modified. This is not true in the staff portal, all documents can be modified by others if there is access available.

You can see below that it is added with the options to delete or update it that are available.

System Administration > Tools > Categories

New Return

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1 - 1 / 1

Name	Delete	Update
Curriculum Vitae		

1 - 1 / 1

Adding a Document

1. Go to the specific area that you want to add a document into. We will use the instructor area from our example above.

Academics > Instructors > Details

Edit Return Delete Next Previous

Name Display Name
Extension Type Faculty
Preferred Email Email
Status Active Rank Assistant Professor
Full/Part Time Full Time Primary Campus Main Campus

Open All Close All

Classes
Computers
Advisers
Departments/Divisions
Contact History
Profile
Address and Contact Info
Contact Info Permissions
Grant Access to an Instructor's Advisers/Classes
Documents

2. Click on the edit button to allow you to add in a new document.

Documents

Añadir

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Titulo Categoría Fecha Agregada

No se han Encontrado Resultados

3. Click on the add button down in the Documents group. This will bring you to a page for you to upload the file. Browse and click upload.

Academics > Instructors > Upload Return

Choose File No file chosen Upload

4. This will allow you to add a title and category and any notes for the file.

Academics > Instructors > Add Document Save Cancel

File Name: Testing1.pdf

Title:

Category: Curriculum Vitae

Notes:

5. Click save and the document will be added.

Address and Contact Info

Contact Info Permissions

Grant Access to an Instructor's Advisees/Classes

Documents

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1 - 1 / 1 < 1 >

Title	Category	Date Added
Testing1	Curriculum Vitae	09/03/2020 09:18 PM

1 - 1 / 1 < 1 >

6. When you click on the link, it will bring you to the screen to allow you to download/view the file, update or delete it.

Academics > Instructors > Document Update Delete Download Return

Title: Testing1

Category: Curriculum Vitae

Created By: jsmouzan

Added: 09/03/2020 09:18 PM

Notes:
