

V6.09 Training Manual

Content Store





Find the freedom to focus on what matters with Nimbus

Contents

Overview	3
Loading files into the Content Store	4
Content Store Window	7
Editing Content	9
Revisions button	12
Emailing Content	13

Document Information

Author	Michelle Fitzgerald
QA	
Version	1
Date Created	19 October 2022
Date	



Overview

The Content Store is a document management tool for storage, document versioning, associating documents of all types to specific records, and management of the documents i.e. editing, locking, updating, revisioning and more.

The first release of Content Store is focussed on being able to load and access files in a simple, easy to use way.

The only file types able to be edited from within the Content Store are Microsoft Office documents. Other files such as Pdf and image files can only be viewed or downloaded.

There are two main ways to access the Content Store:

- 1. From a Form
- 2. From a Report Link, either a column link or header link

ent Magazina	Description De-track fa	rm lanes	Project 101	Job No 1001
b Details Job C	office Details Project Details A	sset / SLA Contact Details		
Status JFP	JerstName	LastName		ermit Required
Job ContactID	158 🚜 Craig	Jackson	UR Permit Required 🗌 SC Pe	ermit Required
Contact Mobile	02102346603			
ontact Email	craig.jackson@talleys.co.nz	New	Generic TMP 📋 Custom T	MP Required
Vork Type	Laneways Laneways	V Job Warning		
ob Address	125 Fairfield Road			
		Job Notes	De-track all farm laneways around twin pon	as.
Supervisor	TimT 🦓			
Current Owner	**	L		
nvoice Queue	Jobbing	Order Number		
Profit Centre	Earth 🥐	Debtor Warning		
		Invoice Notes		(.)
Date Opened	22-Sep-2022			
start Time	22-Sep-2022 20:58	Select Employees to Text		
ob Priority	×		Quoted Fuel Rate	
)ue Date	8°	Send Texts	Invoice Rate	
	() ()			
ate Job Finished				



O Re	fresh Report	Print	🔹 💌 Exp	port 🔻	😿 Clear Sort 🛛 🖉 Clear Filters 🛛 🔚 Sav	e Report Setting 🛛 📊 Cl	ear Report Settin	gs						
Branch	Client Shortname	Order Number	Project	Job Number	Description	Job Contact	Start Time	Status	Superv	Work Type	Current Owner	Content Files	Sales Person	Profit Centre
	<>in 🚜		88					<i>#</i>	<i>8</i> 3		æ		<i>#</i> 3	æ
	Internations.		101	1001	De-track farm lanes	Craig Jackson	22/09/2022	JFP	TimT	Lanewa		2		Earth
	No. of Concession, Name		101	1002	Install pipe under road	Dean Robinson	22/09/2022	QA	BradT	Excav		0	-	Earth
	Property and inter-	P0111		1003	Clean Water Race	Cam Glass	28/09/2022	JFP	DonaldK	Excav	DonaldK	0		Earth
	Berning and			1005	Remove rotten straw	Simon Bonifant	30/09/2022	JA	DonaldK	Excav		0		Earth
	Personal Address			1006	Road repairs after flooding	Kenny Dawson	30/09/2022	AL	PeterL	Trucking		0		Earth
	Second Second			1007	Pond inlet	Ethan Forbes	30/09/2022	AL	DonaldK	Excav		0		Earth
	The second second			1008	Transport Client Gear	Kenny Dawson	30/09/2022	AL	DonaldK	Trans		0		Trans
	here's mil-			1009	Clean water race	Simon Bonifant	05/10/2022	JFP	StuartT	Excav		0		Earth
	Print and the			1010	Remingtons Road Repairs	Kenny Dawson	06/10/2022	JFP	PeterL			0		Earth
	The second second	PO1234		1011	Fill in Water race	Craig Jackson	11/10/2022	QR	DebbieT	Excav		0		Earth
	Renation (1013	Spread AP20 on Driveway	James Proctor	11/10/2022	IX	DebbieT	Excav		0		Earth
	PROPERTY.			1014	Trenching	Grant Reay	18/10/2022	JFP	SteveG	Excav		0		Sitework
	Avenue.			1015	Transport	Ryan Dynes	18/10/2022	JL	PeterL	Trans	DebbieT	0		Trans
	Familian".			1016	Shed foundation		18/10/2022	JFP	DonaldK			0		Sitework

Loading files into the Content Store

When the Content Store opens from either of the above locations it is automatically linked to the source link and source link ID for the record in question.

	3	Add	2	Ema	il 😻 Revisions 😻 Detail			
1	Tools	▼ Viev	v As •	•	Default * 🗸 🖌 🖌 🖓 🗄	# (¢ 8		
		~						
		6	0	X	Name	Description	Last Changed 🍸	User ID
	(W)	1			FarmLanes.docx		19/10/2022 12:	Nimbus
۰.								

Once the Content Store window is open the user can load documents, photos and other files.

The user can load one document or multiple documents at a time using one of two methods:-

- 1. Drag and drop the required document(s) into the grid frame
- 2. Use the Add button from the toolbar to select the required document(s)

Whichever method is chosen it will be mandatory to enter the Doc Purpose and Doc Type for each document/photo.

As soon as the document has been loaded the **Document Tag Entry** form will open:



Doc	ument Tag Entry			0
	0	5 9	Document Purpose	3 .
V	Filename 🥝	Ignore	Document Type	4 ×
V	Content Store Ford Falcon.txt			
6				
-		•		
		*		
		10		8
				6 Save Cancel

- 1 Select the document to be processed by placing a tick against the Filename.
- 2 To select all the documents in the list place a tick in the box to the left of the Filename text
- 3 Document Purpose (This side of the window will not be displayed until a document or documents have been selected). The lookup is based on the Nimbus DocumentPurpose table and it will not show discontinued items. Select the purpose required the example is from the Masters database:

• >
7 records
5
-

 4 - Document Type (This side of the window will not be displayed until a document or documents have been selected). The lookup is based on the Nimbus DocumentType table and it will not show discontinued items. Select the type required - the example is from the Masters database



- Tools -	View As View As	¥ 🗐	+ 💡 🔚 🗢 🗎	6 records
				5
Doctype * 2	Description	Pick order * 1	Detailed description	
Nimbus	Nimbus Consultants	999	For Use By Nimbus Consultants	
Refer	Reference	99	Reference and Training docume	
Template	Template	80	Template for new document	
Employ	Employment Documents	60	Sensitive Documents for select	
MW	Mobile Worker Documents	60	Mobile Worker Documents	
Work	Working Docs for Jobs	10	General access by staff workin	
Work	Working Docs for Jobs	10	General access by staff workin	

- 5 Filter the document list if more than one set of Document Type and Purpose are required to be set
- 6 Save when the information has been entered and all the documents selected will have the same Document purpose and Document type allocated
- 7 Ignore- if this option is selected the document will be ignored. This means it will not remain in the content store.
- 8 Cancel If the Cancel button is selected a confirmation message will be presented. No documents will be uploaded.

Question		×
?	Are you sure you want to No documents will be up Yes	

Note that if the **x exit icon** is selected then the form is closed, and no upload takes place.

If any information is missing, then the documents and or the dropdown fields will be marked with a red exclamation mark with a mouse-over message to advise the user of the issue

Tag 'Document Purpose is Mandatory' OR

Tag 'Document Type is Mandatory' OR



Both are Mandatory

Buttons or report links for the Content Store can be configured to pass through the Document Purpose and Document type as part of the process. This can help automatic the process where this information is known. The link must have both the Document Purpose and Document Type. It will not work with one or the other.

Content Store Window

The Content Store window has the following links:

Last Changed Date Hyperlink

If you click on the hyperlink, you will find a number of options available:

cumen	65									
Upload	d op	tions								
oune	et h	pe :		*						
ourie	et p	v900	e) [
_			ents:10							
E 19	210	10	E Cm	al 👔 Revisions 👔 Detail						
Tools	٠	View	As ¥1	Default* v Bit + P	28 2 4					
	Γ	¥				2				
8		a	💊 🗙	Name	Description	Last Changed *	User ID	User	Ourrent Rev	Ref
		1		20180413_134012.jpg		23/04/2021 13	caniel.k	datielk	6	5
		1		Form_Web25MServiceInfo.xml		25/04/2021 13	danielk	daniel.k	0	5
				Content Store image jpg		22/04/2021 14		Amul ann		Butterfly Log
				Company Logo pro		22/04/2021		ent Store image jog	0	5
81		1		Web2 Content Done - EXAMPLE Links dock		22/04/2021		Content Store image jpg		5
1				Web2 Content Store - EXAMPLE Links door		22/04/2021		ng-Content Store image.jpg	6	5
_		/		Content Store image jpg		21/04/2021	Pow approvals	for Content Store image jpg	6	5
				and the second se		21.01.000	A	AmyLang	1	
-				Content Store image jpg		21/04/2021 10	Army Lang	Acres Paris		¥

Action	Functionality
Activity for < document name>	This will show you an audit log of the document and any activity
Transmittals for < document name >	This will show you a log of any documents that have been sent out (e.g. a record will appear in there if the document is emailed)
Folders containing < document name >	What does this do?
Show approvals for < document name >	? WIP

Name Hyperlink

If you left-click the hyperlink name in the Name column, other options are available to you. This also ticks the document selection flag automatically.



ocumer	rts						
Docume	id option ent type ent purp mis Doci						
Tool	s • Vi	ew As 💌 🛛	Default* 🗸 🖌 🖓 🔢 🕼	8			
					8		
	- 64	💊 X	Name	Description	Last Changed *	User ID	User
3.8	1.1		20180413_134012.jpg		23/04/2021 13	danielk	daniel k
3 🐨	1		Form_Web20MServiceInfo.xml		23/04/2021 13	danielk	danielk
3 🛋	11		Content Store image jpg		22/04/2021 16-	AmyLang	ArryLa
1.8	1		Company Logo pro		22/04/2021 16	AmyLang	ArryLa
0 81	19		Web2 Content Store - EX4100	Dore - EXAMPLE Links docx	22/04/2021 13	AmyLang	Arry La
1 1	1		Watch Contact Store - FXA		22/04/2021 13	AmyLang	Arry La
1	10		Content Store image jog		21/04/2021 10	AmyLang	ArryLa
	1		Content Store image jpg	t Store - EXAMPLE Links dock	21/04/2021 10	AmyLang	AmyLe
1.84					13/04/2021 13		Arry La

Action	Functionality
Preview < document name>	This will open the document in a preview window. This preview window will also allow you to download the document.
Edit < document name>	This will allow you to open the document for editing. This will open a document to be opened in the correct file type media i.e.a word document in Microsoft word. The file type icons are shown to the left of the document name. The amendment is made and then the document is saved. You'll see the location that the document is saved to is the Content Store. When you close that document and refresh your Content Store grid, you'll see that your recently edited (and saved) document is updated in the grid.
Download < document name>	If you click on this, the document is downloaded to your usual download location. Note : By downloading the document from here you will not be able to save it back into the Content Store. Any saves are saved to your download folder only.

Duplicates Hyperlink

To detect suspected duplicates the system normalises document names by stripping out a document revision if present. The resultant name is known internally as the root name. The root name is then compared with the root names of all other documents in the same folder and matching names are considered as suspected duplicates. Click on the hyperlink in the 'Duplicate' column.



al options									
all partners									
	•)								
ra buunana 104	0								
3 B	at I farmers I benef								
a w then by w	Defect · · · · · · · · · · · · · · · · · · ·						+ Documents	Ante	Current Name mapping
						T T T	~	Description.	
A SX	Nata	Description	Last Duriget * Use 8	ine.	Garantike: Ref.	Dati Datity Daity		Rectore	
	mani Corners Inco. DomPut Laborators		Delte-Stip to Amplang	Amplung	1				Ansiste Ansist 21-04-0021-1028
	pressent, reservices		25-04-3621 10., metal k	danata .				Last Duriget Kin Son	Take 370 Am
	Farm, Nati 2047an coatella and		25/04/2021 Vb., danafik	dama'a				manual .	2
	Curter Done maps pro		Side 2021 16., Amplang	Amplung	S Butter Ry Log			Reference -	
	CompanyLograms		EDITOR DED TH., AmyLang	Anutang				Revision Ref.	
1.1	Head Content Date: Excellent Latin data		20194/3521 13., Ampliang	AnyLong		1		Anison Date	
	Carten Dave maps pg		PLON HER MALLERY	AnyLong		1		Nonfrance	Permanent DON Auro Parts
	Content Store maps gap		Endwidten Hit, Amylang	AnyLang					
1 V	Test Document Ray Content Dane aloco		13-04-352110. Amplang	AnyLang				Autority on a strate.	authe use performs the following extensi
Reported Auflines	en of Content Brock Image (pg								
B 12-11	Canal Manager Manager								9
. Task + time i	N.* Mart - 18/10/19/2	1.2.4							Descent
							-		
	X new	Description .	Last Danget * . Un	+ 0 iver	form the ful	But Darly Built			
0.	Current Incol maps and		20-08-007 TR., AM	uting Amuting	1.8.0	efficience a			
	Content Store mapping		2104(30) 10. AN	and and and					

How to resolve duplicates is covered later in the manual.

Editing Content

Details Button

Highlighting the document and clicking the 'Details' button will produce a details pane on the right where you'll be able to interact with the document further.

et un territo									
labor after									
and the second									
Contract Automation									
ettern brunets 104									
1 G	di terrer di betal								
Tanta W Manufac W / 1	- WILL - WILL						* Decame	here	Content lines mapping
					1			Beautypes	
0 0 X	harte	Description.	Last Duriged	104.0	104	formulas had a	hat burly burly	Revision Last Diargeolity	0 Ancieng-Ancieng
	an and a contract of		State State 14	term h	danatik.			Last Charged	(1) (a) (b) (b) (b) (b) (b) (b) (b) (b) (b) (b
¥ /	Form, Math.2007ber autority, and		20-0e-2021 12.	Genel3	daniel h			dia los	1 Sell-2707 (selle)
	Content Done magnuing		10-14-10-14.	AnyLang	AnyLong		1	Indexed	2
	Company Logicuma		12-04-302 H.		AnyLang			Advance	
	and Committee Committee and		10-04-00P 13.	Arty Lang	any year			Rectaur Ref.	
	and Consections Committee days		20104-2021-10		AnyLang			Revision Date:	
	Connect Burn Anage (eg.		21/04/04/21 10		Any Long			Parau	Connerts Tape Notes Notice a
	Curtere Bure image jag		2184,382 18		AnyLang			a	mann . a h G e gtantat .
1 C	Net Desurant Ray Lonant Box Asso		15-be-3621 13-	AnyLang	AnyLang			2.01	

The top section of this panel is mainly static information with the exception of the 'Reference' field. This 'Reference' field allows the user to place a globally unique reference for the document across the whole system. An example of where this may be needed is where a Word Report would normally have a company logo on it. By setting a reference there it will allow the search to pick it up.

There are several tabs within this pane described below:



Tab	Function
Preview	This shows an image of the document in a preview format
Comments	This allows the user to keep a record of comments made in relation to the document. Arguably a bit like a chat window.
Tag	This tab is where you're able to tag the document. The tag information will be displayed here automatically as DOC_Purpose and DOC_Type are mandatory fields before you're able to add the document.
	You must, however, fill in this tag information if you're adding a document through the menu link.
Notes	This allows the user to record notes. It's just an open window. Any notes here will be displayed in the Comments tab. This appears to be by way of a batch process as it doesn't appear there immediately. Take note that while you can remove the note in the Notes tab, the record of the note cannot be deleted in the Comments Tab.
Notifications	This allows the user to set notifications on a particular document. For example, a notification is sent to the user if the document is downloaded/changed in anyway. There are several different options available to be notified for.
Permissions	This tab exposes what permissions the user currently has for the document. This is not editable here.
OCR	If the document was an image, then this tab will expose the text that was extracted from that image.
Form	N/A for Nimbus.
Form Data	N/A for Nimbus.

In the preview tab you will find some additional options available to you. A couple to point out are the annotations and comments. When emailing the document out from Content Store there is an option to include the annotations. If this option is chosen it will automatically generate a PDF for you.



Name	FarmLanes.do	cx				
Description						
Revision	2					
Last Changed By	tim - Tim Tarbo	otton				
Last Changed	19/10/2022 14	4:39				
File Size	12.29KB (12,58	88 bytes)				
Indexed						_
Reference						_
Revision Ref.						
Revision Date						
Preview	Comments	Tags	Notes	Notific	4 1	ſ
	1.22			1117		
48 24	Fit to Width 👻	🔒 Tt		J Dow	moad	
	k Farm lanes		xample of	text		
This docur	ik Farm lanes nent isall about de-tracking me extra test			text		
This docur I added so	nent is all about de-tracking	some farm länes for Ta Comme	lies. nts box	text		
This docur I added so	nent is all about de-tracking me extra text	some farm lanes for Ta	lies. nts box	text		
This docur Ladded so Pháits wea	nent is all about de-tracking me extra text	some farm länes for Ta Comme	lies. nts box	text		
This docur Ladded so Pháits wea	nent is all about de-tracking me extra test rring a much nicer shirt now	some farm länes for Ta Comme	lies. nts box	text		
This docur Ladded so Pháits wea	nent is all about de-tracking me extra test rring a much nicer shirt now	some farm länes for Ta Comme	lies. nts box	text		
This docur Ladded so Pháits wea	nent is all about de-tracking me extra test rring a much nicer shirt now	some farm länes for Ta Comme	lies. nts box	text		
This docur Ladded so Pháits wea	nent is all about de-tracking me extra test rring a much nicer shirt now	some farm länes for Ta Comme	lies. nts box	text		
This docur Ladded so Pháits wea	nent is all about de-tracking me extra test rring a much nicer shirt now	some farm länes for Ta Comme	lies. nts box	text		
This docur Ladded so Pháits wea	nent is all about de-tracking me extra test rring a much nicer shirt now	some farm länes for Ta Comme	lies. nts box	text		
This docur Ladded so Pháits wea	nent is all about de-tracking me extra test rring a much nicer shirt now	some farm länes for Ta Comme	lies. nts box	text		

Check In/Out

To check a document out tick the tick box icon so it turns green, then click on the pencil icon to edit it.

Documents		
Upload options		
Document type :	Employ 🗸	
Document purpose :	Tender 🗸	
Contacts Documents :	1008	
😑 🗟 Add 📓	🖀 Email 📓 Revisions 📓 Detail	
📃 Tools 👻 View As	💌 Default * 🗸 🖌 🖌 🖓 🛄 🖨	8
	X Name	Description
🗹 🗐 🖌 💊	X Example Template .docx	
🗆 💽 🗸 d .	ckout Example Template .docx	

If the file is changed and saved, you can check the item back into content store by clicking on the green tick box again. Once the Content Store has completed updating you'll notice that the 'Current Rev' column will have incremented up by one.

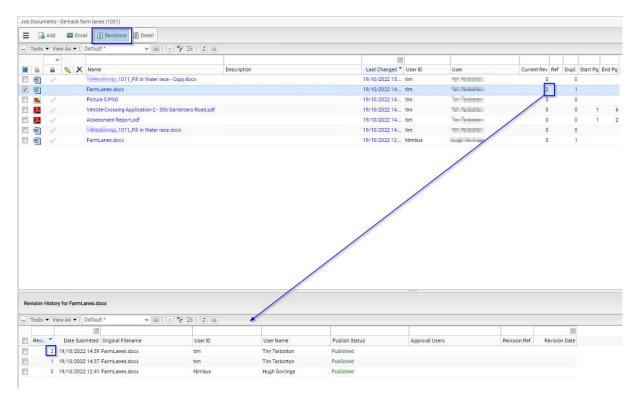


You can achieve the same outcome from the Revision window:

			apperSource-ContactAlSou							¢ 🖬	
beursets.											
lative afters											
Becamertage Engra											
Decement auguster Servicer +											
Certain Sourceine 1008											
E Gas Block Shows Stort											(4
a free a version a ferrar a set o	Y 2 2 4										2 December
-											
E B A N X tare	Emotion	inter and a second s		the Water B	1 mm			al Banity Baity			
2 El 🖌 🖌 🔪 X Samala Sanala Ana			-046.962	in any Lang	Ampliang		1				
🗇 🛋 🧹 🛛 Carmen Sous mage pag			10.00.0021	the strategy -	Ampliang						
									≠ langer	State & Desta	
, Tails * Header * Selact *	Y B 4 +								€ (mpr	Non & Dean ()	i stati tana 2
- Talk • Tau Ar • (arts.) - • (a) (a									€ langer	Nam & Deam (2	
E Res. * Des Labores Drand Reserve	Use 0	Can Name Market	Antor Sana	Ageneration	•	Revented	a Respective		€ (mpr	N an & Deca G	
a Talk • Yes & • (brind * •) (1)		Cashare Anjung Anjung	Auto Seus Pueseer Pueseer	Age with the	•	feries for			≠ layer	€te ≜oux Q	

Revisions button

In the Content Store window one of the columns shows the number of revisions for each file. By clicking on the Revisions button in the toolbar this opens a Revisions section in the window. This contains information on each revision and these can be previewed and downloaded as per the main filing listing in the Content Store window by clicking on the Review number





Emailing Content

Files can be emailed from the Content Store.

Emailing out from Content Store is achieved by highlighting the record/s and clicking the 'Email' button. The attachment will attach itself automatically.

Send Documents		
🚥 Send 🤤 Discard Template : 🔹 👻 👔 Other		
To: 1		All
cc.		All
BCC :		All
Subject: 2		
Send Attachments as : System Default 🐱 Add Internal Attachment Add External Attachment		
I Name	Include Annotation	s Convert to PDF
FarmLanes.docx (internal)	4	6
Picture 5.PNG (internal)		
Font → Size → B I A → D → E = = = HE HE		
6		

- 1. Enter the email address of the recipient
- 2. Enter the subject of the email
- 3. Shows the files attached for sending
- 4. If you tick this the files will include any annotations added in the preview section illustrated earlier and convert the files to pdf
- 5. If you don't tick Annotations and would like the files to send as PDF then use this tick box
- 6. Type your email

Emails sent through Content Store will use the employee's email address (if loaded in Nimbus), otherwise it will use the global email address loaded into the system e.g. <u>admin@nimbus.co.nz</u>.