



V6.09 Training Manual



Content Store



Find the freedom to focus on what matters with Nimbus

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Document Information

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Date	

Overview

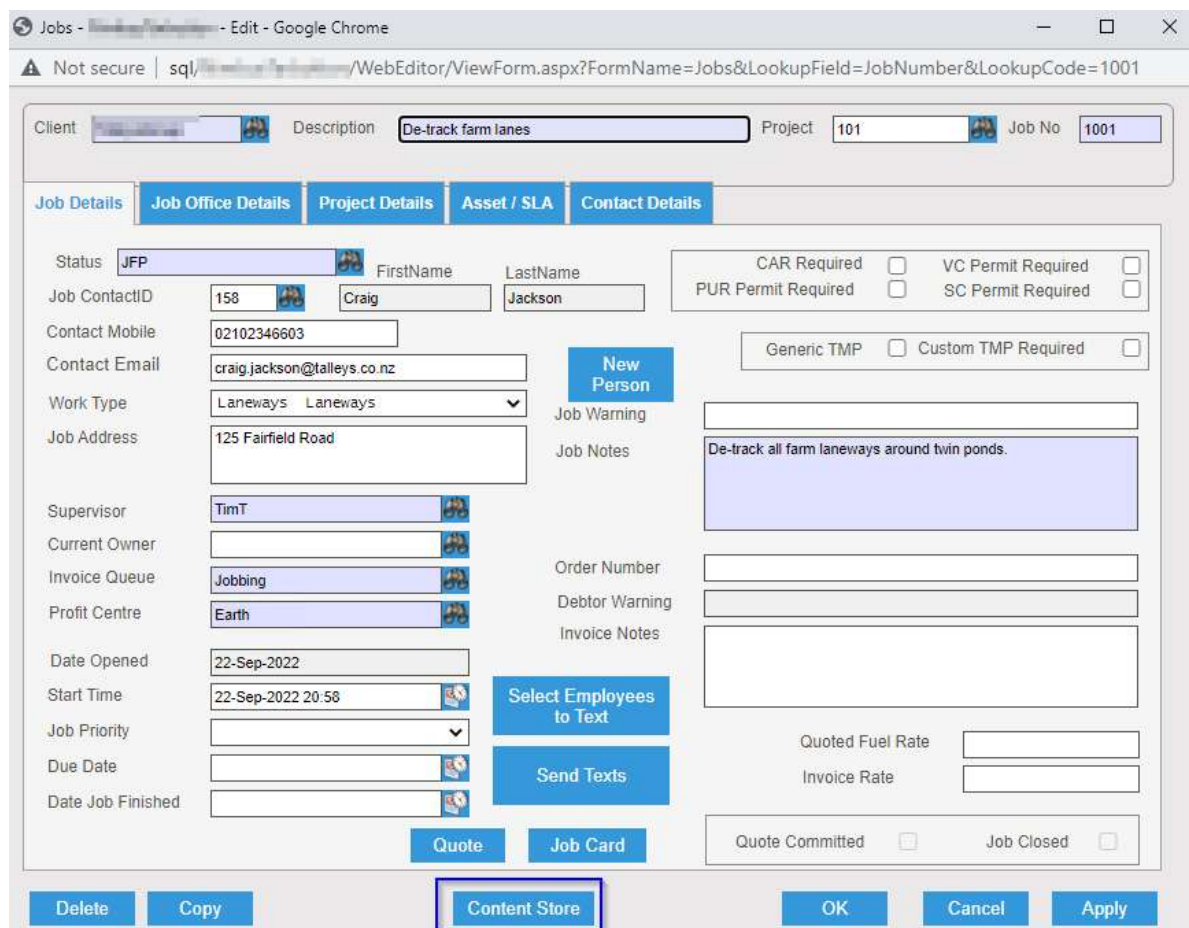
The Content Store is a document management tool for storage, document versioning, associating documents of all types to specific records, and management of the documents i.e. editing, locking, updating, revisioning and more.

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



The screenshot shows a web browser window displaying a form for editing job details. The form is titled 'Jobs - Edit - Google Chrome' and the URL is 'http://localhost:1001/WebEditor/ViewForm.aspx?FormName=Jobs&LookupField=JobNumber&LookupCode=1001'. The form contains several sections and fields:

- Client:** [Dropdown]
- Description:** De-track farm lanes
- Project:** 101
- Job No:** 1001
- Tabs:** Job Details, Job Office Details, Project Details, Asset / SLA, Contact Details
- Status:** JFP
- Job ContactID:** 158
- Contact Mobile:** 02102346603
- Contact Email:** craig.jackson@talleys.co.nz
- Work Type:** Laneways
- Job Address:** 125 Fairfield Road
- Supervisor:** TimT
- Current Owner:** [Dropdown]
- Invoice Queue:** Jobbing
- Profit Centre:** Earth
- Date Opened:** 22-Sep-2022
- Start Time:** 22-Sep-2022 20:58
- Job Priority:** [Dropdown]
- Due Date:** [Dropdown]
- Date Job Finished:** [Dropdown]
- Checkboxes:** CAR Required, VC Permit Required, PUR Permit Required, SC Permit Required, Generic TMP, Custom TMP Required
- Buttons:** New Person, Select Employees to Text, Send Texts, Quote, Job Card
- Job Notes:** De-track all farm laneways around twin ponds.
- Form Footer:** Delete, Copy, Content Store (highlighted), OK, Cancel, Apply

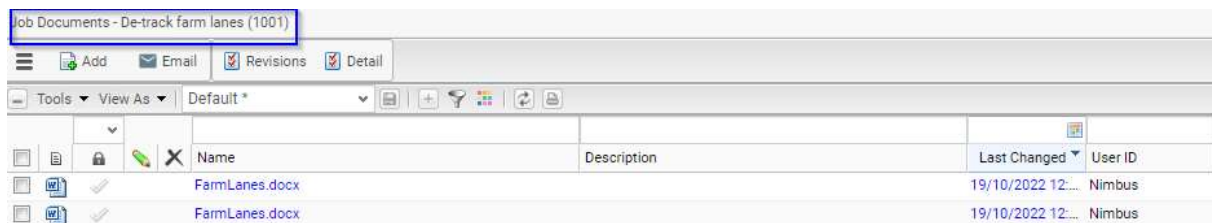
Jobs List : List of jobs for listing, selection and drilling.
Filter : Client Shortname not equal to internal and Closed equals 0

Refresh Report Print Export Clear Sort Clear Filters Save Report Setting Clear Report Settings

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
			101	1001	De-track farm lanes	Craig Jackson	22/09/2022	JFP	TimT	Lanewa...		2		Earth
			101	1002	Install pipe under road	Dean Robinson	22/09/2022	QA	BradT	Excav		0		Earth
	PO111			1003	Clean Water Race	Cam Glass	28/09/2022	JFP	DonaldK	Excav	DonaldK	0		Earth
				1005	Remove rotten straw	Simon Bonifant	30/09/2022	JA	DonaldK	Excav		0		Earth
				1006	Road repairs after flooding	Kenny Dawson	30/09/2022	JA	PeterL	Trucking		0		Earth
				1007	Pond inlet	Ethan Forbes	30/09/2022	JA	DonaldK	Excav		0		Earth
				1008	Transport Client Gear	Kenny Dawson	30/09/2022	JA	DonaldK	Trans		0		Trans
				1009	Clean water race	Simon Bonifant	05/10/2022	JFP	StuartT	Excav		0		Earth
				1010	Remingtons Road Repairs	Kenny Dawson	06/10/2022	JFP	PeterL	Excav		0		Earth
	PO1234			1011	Fill in Water race	Craig Jackson	11/10/2022	QR	DebbieT	Excav		0		Earth
				1013	Spread AP20 on Driveway	James Proctor	11/10/2022	XI	DebbieT	Excav		0		Earth
				1014	Trenching	Grant Reay	18/10/2022	JFP	SteveG	Excav		0		Sitework
				1015	Transport	Ryan Dynes	18/10/2022	JL	PeterL	Trans	DebbieT	0		Trans
				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.



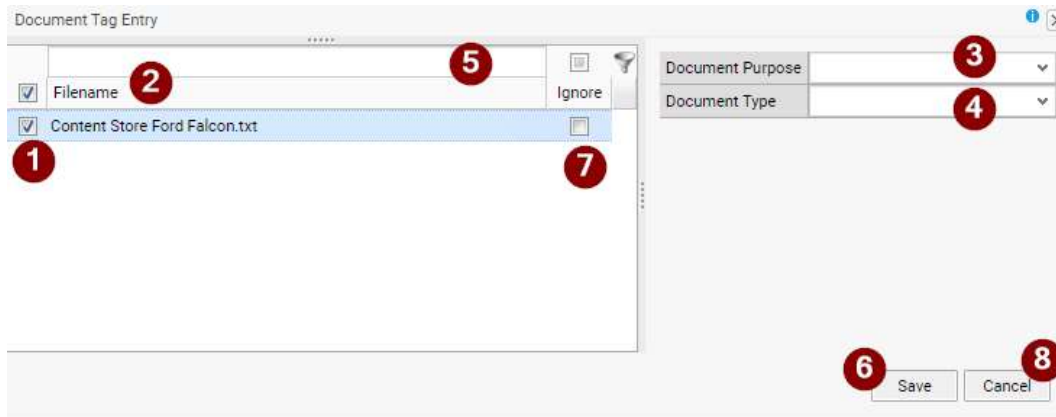
Once the Content Store window is open the user can load documents, photos and other files.

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

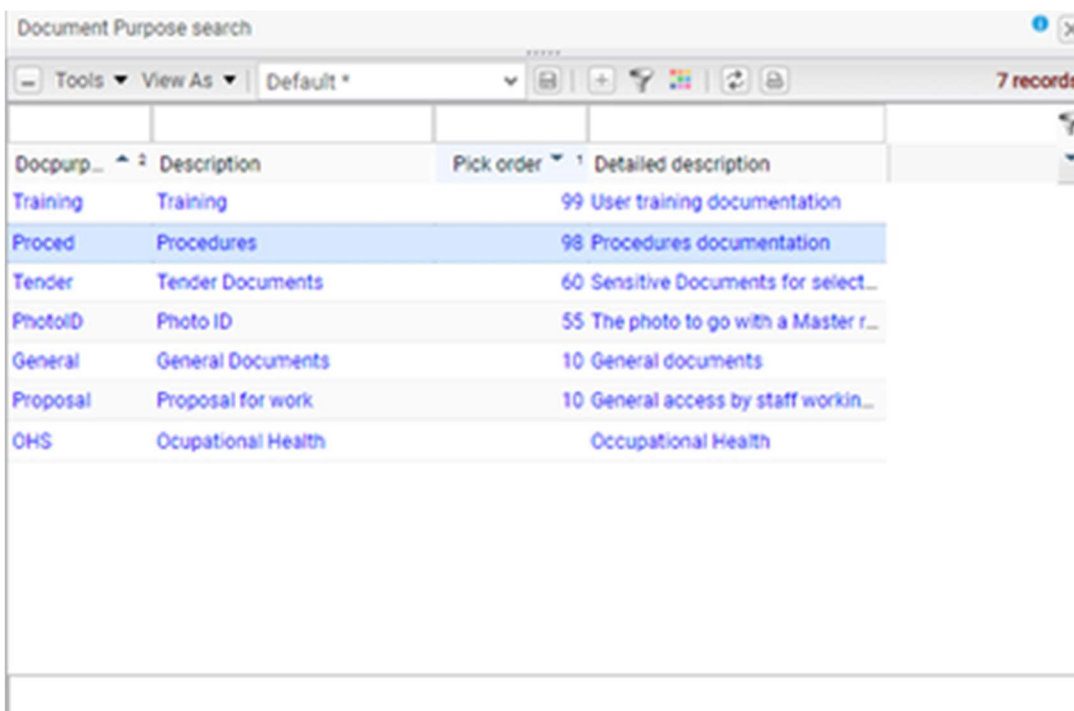
1. Drag and drop the required document(s) into the grid frame
2. Use the Add button from the toolbar to select the required document(s)

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:



- 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:



Docpurp...	Description	Pick order	Detailed description
Training	Training	99	User training documentation
Proced	Procedures	98	Procedures documentation
Tender	Tender Documents	60	Sensitive Documents for select...
PhotoID	Photo ID	55	The photo to go with a Master r...
General	General Documents	10	General documents
Proposal	Proposal for work	10	General access by staff workin...
OHS	Occupational Health		Occupational Health

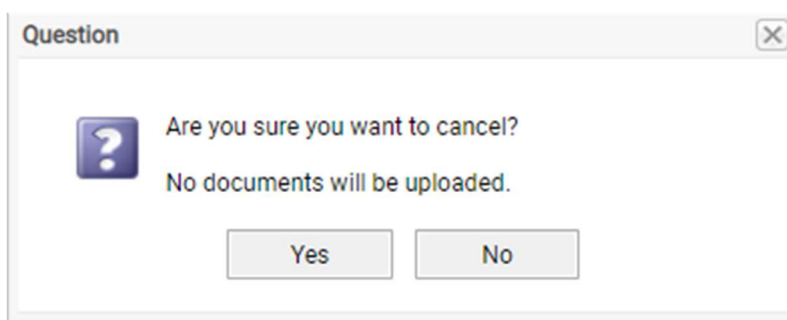
- 4 - **Document Type** (This side of the window will not be displayed until a document or documents have been selected). The lookup is based on the Nimbus DocumentType table and it will not show discontinued items. Select the type required - the example is from the Masters database

Document Type search

Tools View As Default * 6 records

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...

- 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.



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

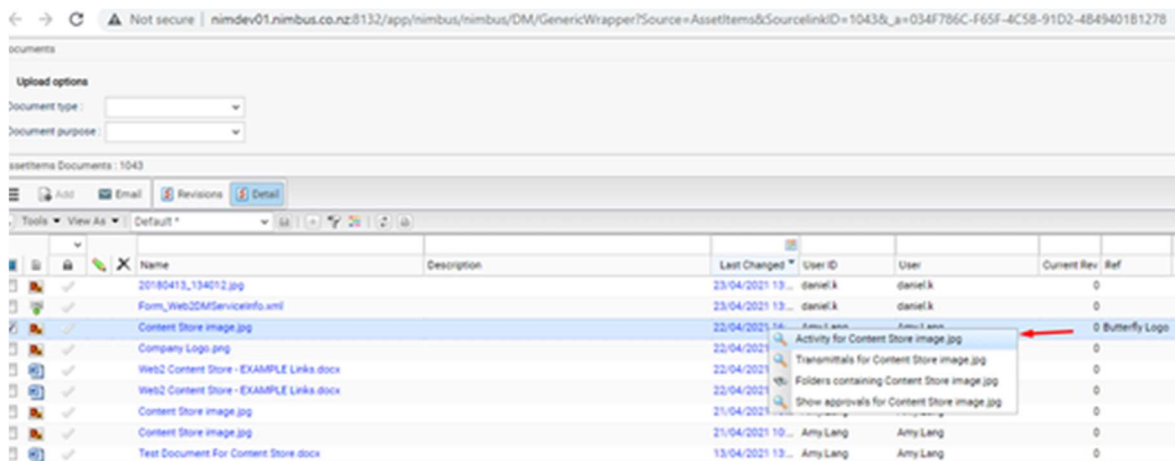
Buttons or report links for the Content Store can be configured to pass through the Document Purpose and Document type as part of the process. This can help automatic the process where this information is known. The link must have both the Document Purpose and Document Type. It will not work with one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

Content Store Window

The Content Store window has the following links:

Last Changed Date Hyperlink

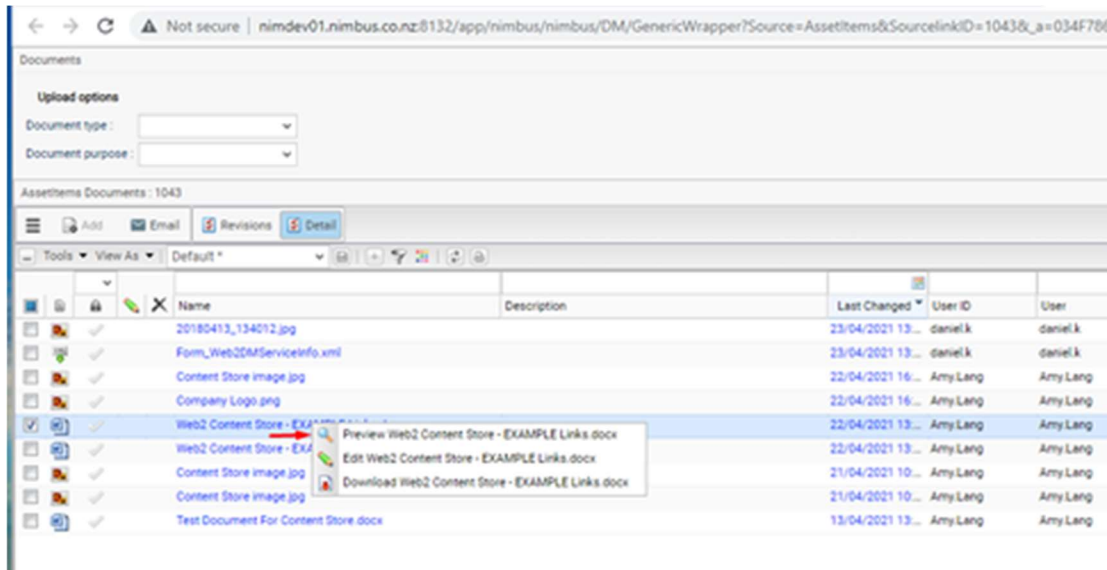
If you click on the hyperlink, you will find a number of options available:



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

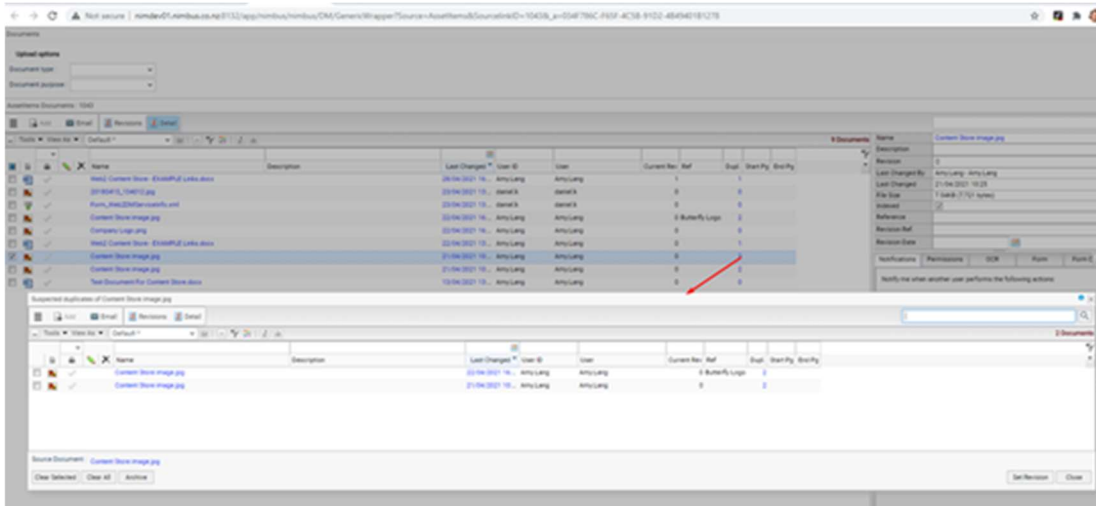
If you left-click the hyperlink name in the Name column, other options are available to you. This also ticks the document selection flag automatically.



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 >	<p>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.</p> <p>The file type icons are shown to the left of the document name.</p> <p>The amendment is made and then the document is saved.</p> <p>You'll see the location that the document is saved to is the Content Store.</p> <p>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.</p>
Download < document name >	<p>If you click on this, the document is downloaded to your usual download location.</p> <p>Note: By downloading the document from here you will not be able to save it back into the Content Store.</p> <p>Any saves are saved to your download folder only.</p>

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.

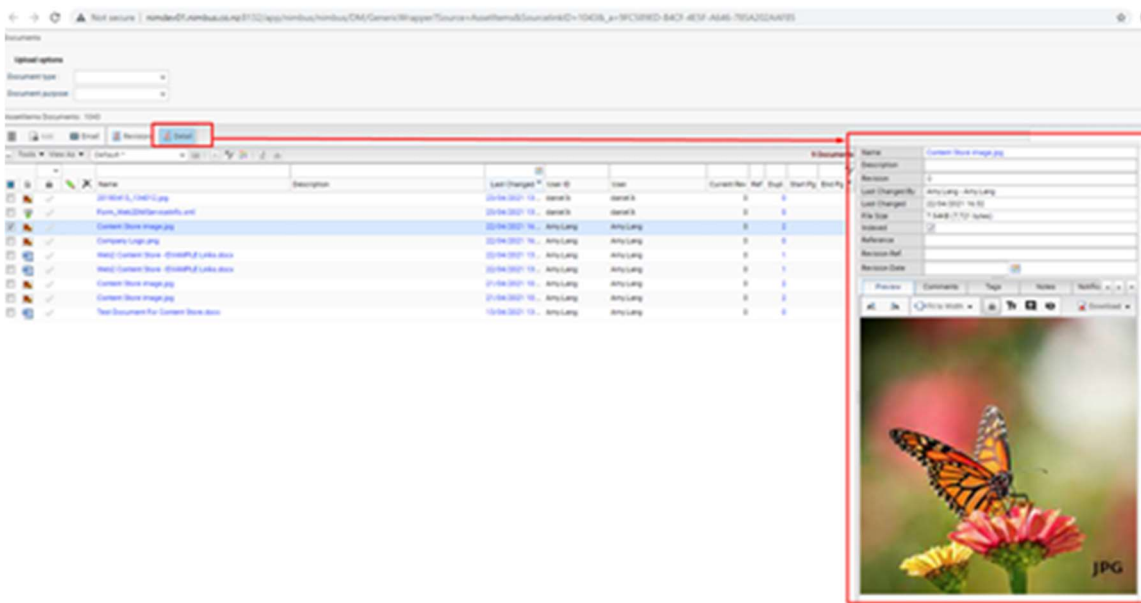


How to resolve duplicates is covered later in the manual.

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.

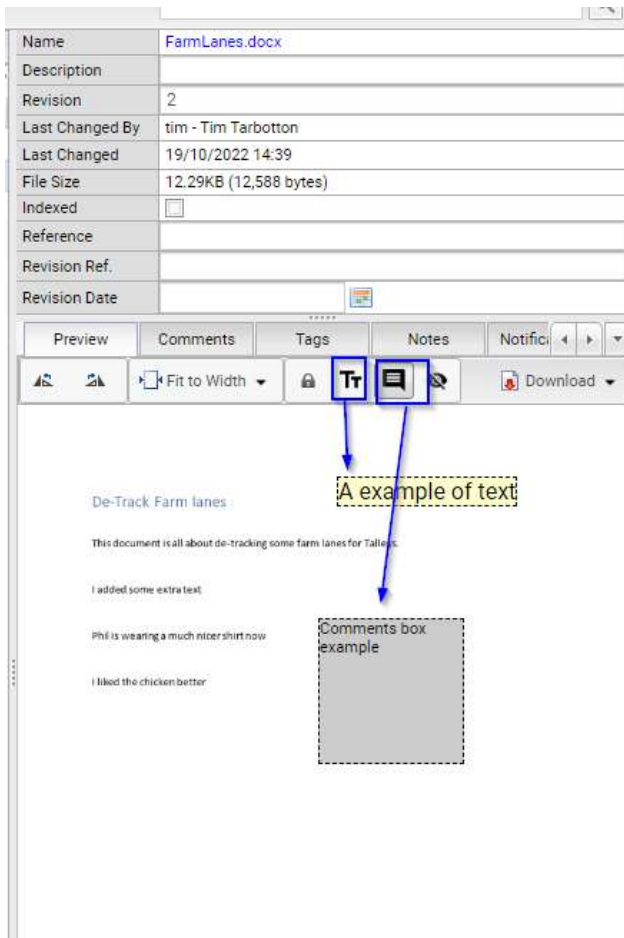


The top section of this panel is mainly static information with the exception of the 'Reference' field. This 'Reference' field allows the user to place a globally unique reference for the document across the whole system. An example of where this may be needed is where a Word Report would normally have 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:

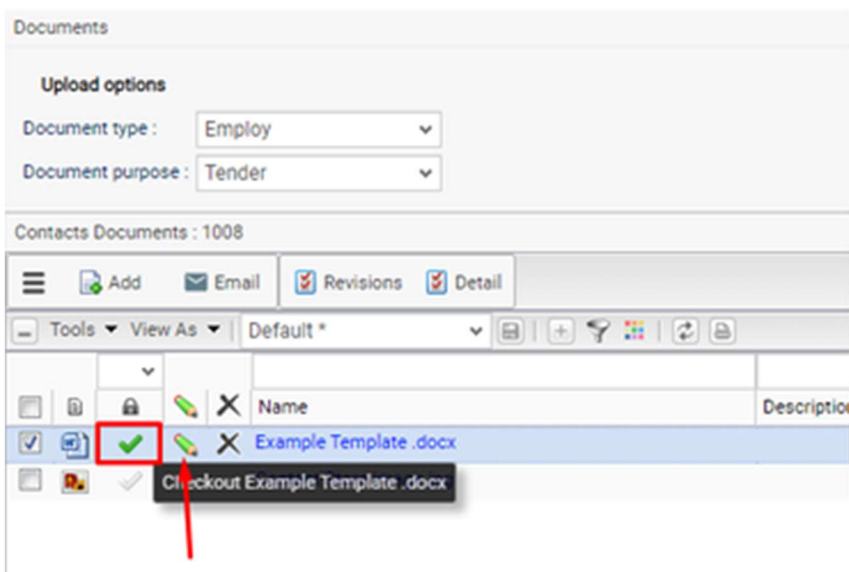
Tab	Function
Preview	This shows an image of the document in a preview format
Comments	This allows the user to keep a record of comments made in relation to the document. Arguably a bit like a chat window.
Tag	<p>This tab is where you're able to tag the document. The tag information will be displayed here automatically as DOC_Purpose and DOC_Type are mandatory fields before you're able to add the document.</p> <p>You must, however, fill in this tag information if you're adding a document through the menu link.</p>
Notes	<p>This allows the user to record notes. It's just an open window. Any notes here will be displayed in the Comments tab. <i>This appears to be by way of a batch process as it doesn't appear there immediately.</i></p> <p>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.</p>
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.



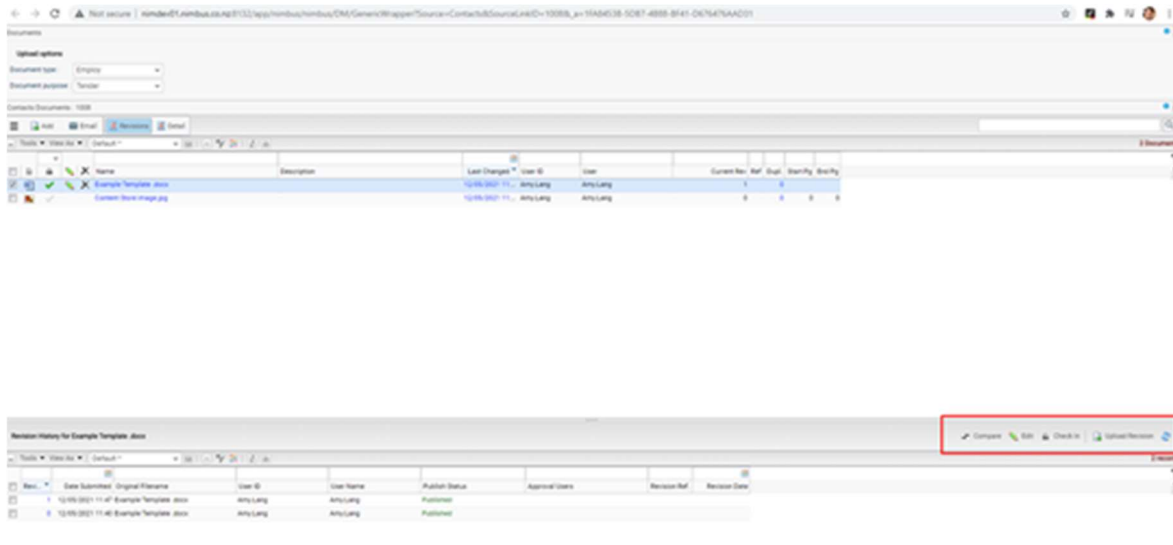
Check In/Out

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



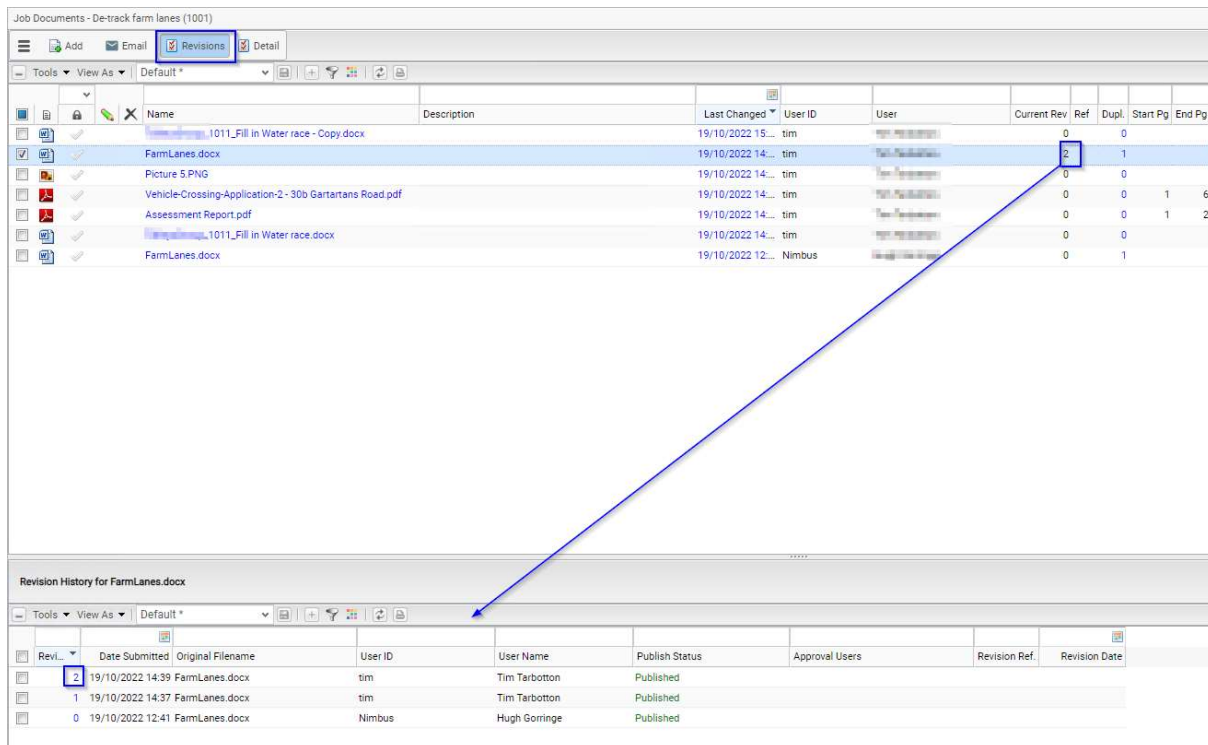
If the file is changed and saved, you can check the item back into content store by clicking on the green tick box again. Once the Content Store has completed updating you'll notice that the 'Current Rev' column will have incremented up by one.

You can achieve the same outcome from the Revision window:



Revisions button

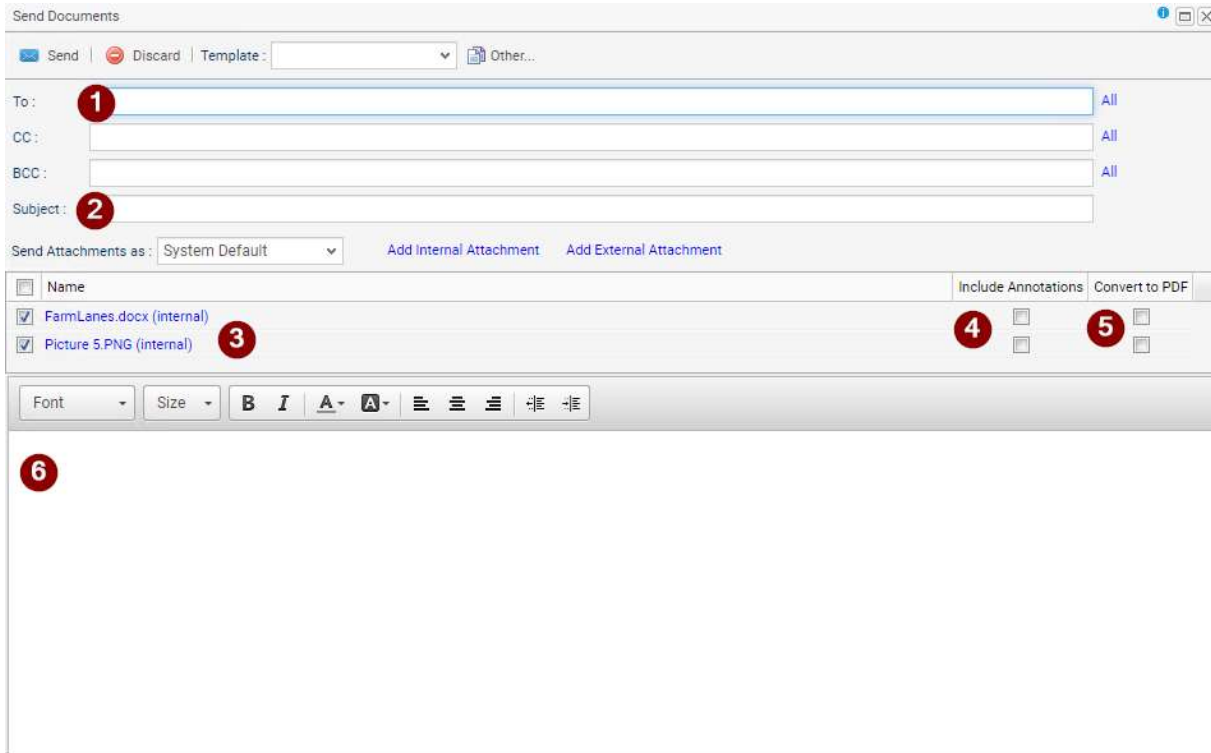
In the Content Store window one of the columns shows the number of revisions for each file. By clicking on the Revisions button in the toolbar this opens a Revisions section in the window. This contains information on each revision and these can be previewed and downloaded as per the main filing listing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



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. admin@nimbus.co.nz.