

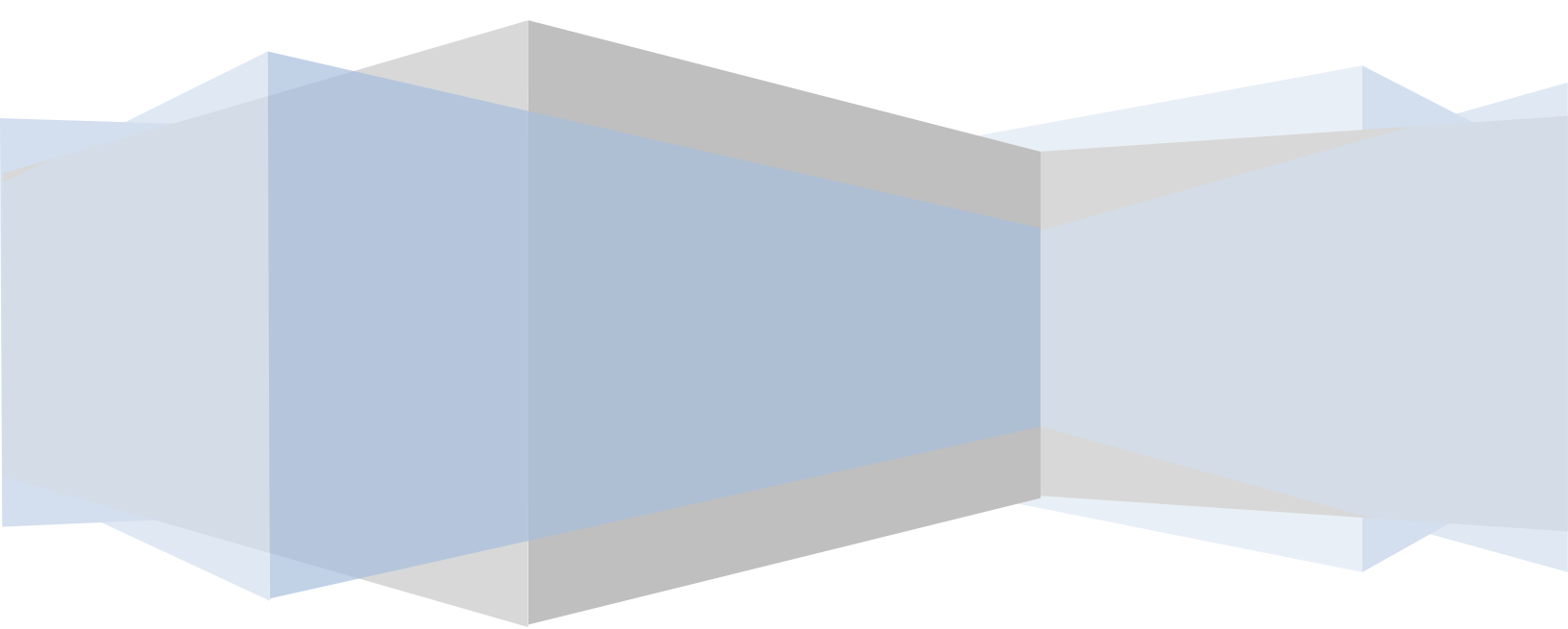
COMWeb Internet Solutions

# COMWeb2.0 Admin Guide

## Document Management

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mkatz



# COMWeb2.0 Admin Guide Document Management

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## COMWeb Document Management Admin Guide

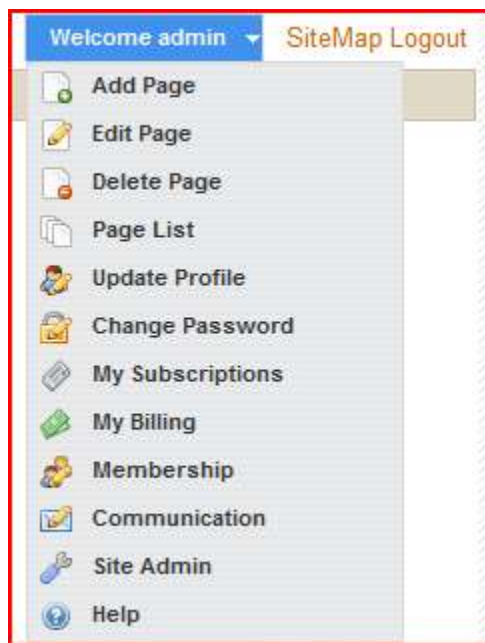
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### Introduction

You can store documents for your website in a Library. Each Library will contain the main filing system for a document. As you create more documents, you can also create corresponding Library Subsections. By creating Libraries and Library Subsections, you can organize and quickly locate files and documents.

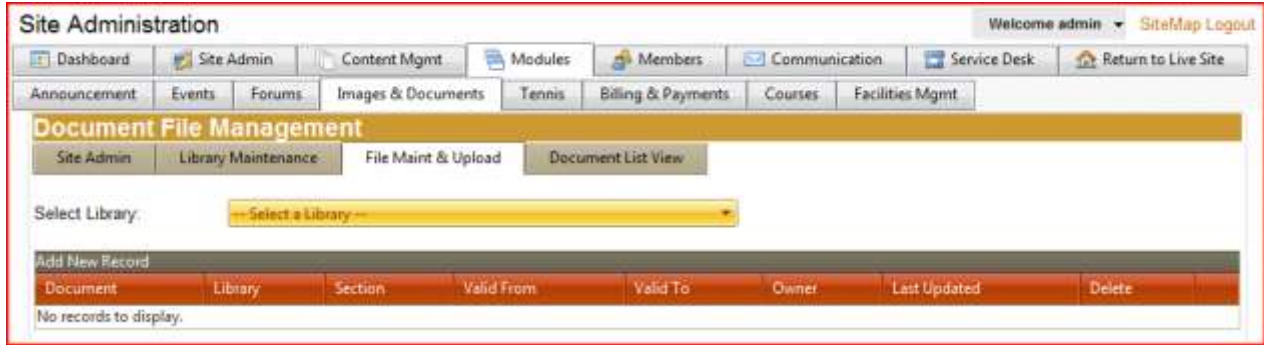
### How to Locate Documents

From the drop down welcome menu, click on the Site Admin link.



This will take you to the Dashboard. From the Dashboard, click on the Modules tab and then on the Images and Documents tab.

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The Document File Management page will open to help you locate and manage document files within the website.

## Document Management

There are four tabs located in Document File Management. They are Site Admin, Library Maintenance, File Maintenance and Upload, and the Document List View.

## Setting up the Document Library Management System

Click on the Library Maintenance tab to create a new library for a document. The Main Library allows you to create a main filing system for documents. You can also choose to create subsections, or Library Sections to help organize your filing system. The Main Libraries and the Library Sections will be displayed under the Library Management page.



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To create a New Main Library, fill out the fields, choose Category permissions and click on the Add Library button. The new library will show up as a drop down option in the Main Library section of the page.

Here's an example of a Main Library needed called, Board Minutes. This will contain all the minutes from past board meetings online and available for members to view.

### Document Library Management

Site Admin   Library Maintenance   File Maint & Upload   Document List View

Create New Main Library:

Select Category:

To create a New Library Section, use the drop down menu option to find the category in the main Library and then type in the name of the new Library section file and click on the Add Library Section button.

Select Main Library:

Create New Library Section:

Now there's a Library section for all the Board Meetings and they will be divided by year and then eventually by monthly meetings.

### Document Library Management

Site Admin   Library Maintenance   File Maint & Upload   Document List View

Create New Main Library:

Select Category:

Select Main Library:

Create New Library Section:

	Library/Section	Category
>	Board Minutes	Members Only (Viewable by All Registered Users)
	Legal Documents	Members Only (Viewable by All Registered Users)

## Placing a Document File

To find a file that needs to be edited or to place a document into an existing file, click on the File Maintenance and Upload tab. Select a Library from the drop down menu button. A list of all the libraries and documents will be available for editing or to delete from the selected Library.

The screenshot shows the 'Document File Management' interface. At the top, there are navigation tabs: 'Site Admin', 'Library Maintenance', 'File Maint & Upload', and 'Document List View'. Below the tabs, there is a 'Select Library:' dropdown menu that is currently open, showing three options: '-- Select a Library --', 'All Libraries', and 'Board Minutes'. To the right of the dropdown menu, there is a table with columns for 'Document', 'Library', 'Owner', 'Last Updated', and 'Delete'. The table is currently empty, with the text 'No records to display.' below it.

The Library will open for the section. You can edit an existing document or upload a document into the Library. To edit a document, click on the edit icon next to the document.

The screenshot shows the 'Document File Management' interface with the 'Board Minutes' library selected in the 'Select Library:' dropdown menu. Below the dropdown menu, there is an 'Add New Record' button. Below that, there is a table with columns for 'Document', 'Library', 'Section', 'Valid From', 'Valid To', 'Owner', 'Last Updated', 'Delete', and 'Edit'. The table contains three rows of data:

Document	Library	Section	Valid From	Valid To	Owner	Last Updated	Delete	Edit
minutes June2009	Board Minutes	Board Minutes 2009	6/1/2009		board	9/4/2009	Delete	Edit
minutes July2009	Board Minutes	Board Minutes 2009	6/1/2009		board	9/4/2009	Delete	Edit
minutes August2009	Board Minutes	Board Minutes 2009	6/1/2009		board	9/4/2009	Delete	Edit

Upload a document by clicking on the Add New Record button at the top of the document list. Fill out the fields and upload the document from your source- in this case; the document was already in a word application on the computer. Click on Save to add the new document to the list.

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The screenshot shows a web browser window titled "Edit Form" with a red border. The main heading is "Add New Document Record". The form contains the following fields and controls:

- Category:** A dropdown menu with "Board Minutes" selected.
- Sub-Category:** A dropdown menu with "Board Minutes 2009" selected.
- File Upload:** A text input field containing "C:\fakepath\minutes September2009.docx" and a "Select" button. To the right, it says "No uploaded files".
- Short Description:** A text input field containing "minutes September2009".
- Long Description:** A larger text area containing "minutes from meeting Septemeber 2009".
- Display Order:** A label next to a text input field.
- Valid From Date:** A date input field containing "9/1/2009" with a calendar icon.
- Valid To Date:** An empty date input field with a calendar icon.
- Owner:** A text input field containing "board".
- At the bottom left, there are "Save" and "Cancel" buttons.

The newly uploaded document can be located in the Library in the section called Board Minutes. You can see when it was added and who added it as well as make changes or delete it if necessary from the list.

The screenshot shows the "Document File Management" interface. At the top, there are tabs for "Site Admin", "Library Maintenance" (which is active), "File Maint & Upload", and "Document List View". Below the tabs is a "Select Library:" dropdown menu with "Board Minutes" selected. Underneath is a section titled "Add New Record" which is currently empty. The main part of the interface is a table with the following data:

Document	Library	Section	Valid From	Valid To	Owner	Last Updated	Delete	Edit
minutes June2009	Board Minutes	Board Minutes 2009	6/1/2009		board	9/4/2009	Delete	Edit
minutes July2009	Board Minutes	Board Minutes 2009	6/1/2009		board	9/4/2009	Delete	Edit
minutes August2009	Board Minutes	Board Minutes 2009	6/1/2009		board	9/4/2009	Delete	Edit
minutes September2009	Board Minutes	Board Minutes 2009	9/1/2009		board	9/4/2009	Delete	Edit

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## Viewing the List of Documents in a Library

By clicking on the Document List View tab, you will be able view a list of documents in a Library. Select a Library from the drop down menu option. The documents will appear by Main Library and then by Library Subsection.

