

How to use the Document Management System

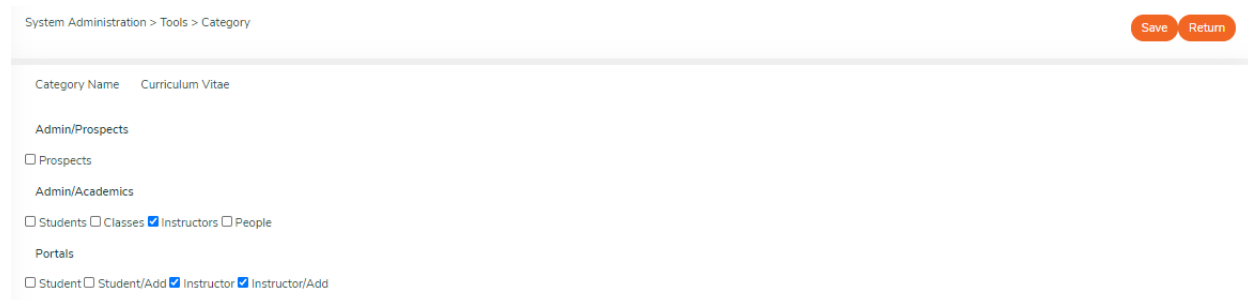
GNECsis has a feature that allows you to add in documents for persons, classes, organizations and churches into the system. This allows documents to be tied to specific people and/or classes. It also has the capability for faculty and students to upload documents in their portals. It is available in most locations in the system, usually on the main page or the history area.

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:



The screenshot shows a web interface for adding a new category. At the top left, the breadcrumb navigation reads "System Administration > Tools > Category". At the top right, there are two orange buttons labeled "Save" and "Return". The main form area is titled "Category Name" and contains the text "Curriculum Vitae". Below this, there are three sections of checkboxes:

- Admin/Prospects**: Prospects
- Admin/Academics**: Students Classes Instructors People
- Portals**: Student Student/Add Instructor Instructor/Add

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

- 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.
- If the Student/Add or Instructor/Add box is ticked, that will allow a student or instructor to upload a document using that category.
- 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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Name	Delete	Update
Curriculum Vitae		

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Adding a Document

- 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

Extension

Preferred Email

Status: Active

Full/Part Time: Full Time


Display Name

Type: Faculty

Rank: Assistant Professor

Primary Campus: Main Campus

[Email](#)



[Open All](#) [Close All](#)

Classes

Campuses

Advisees

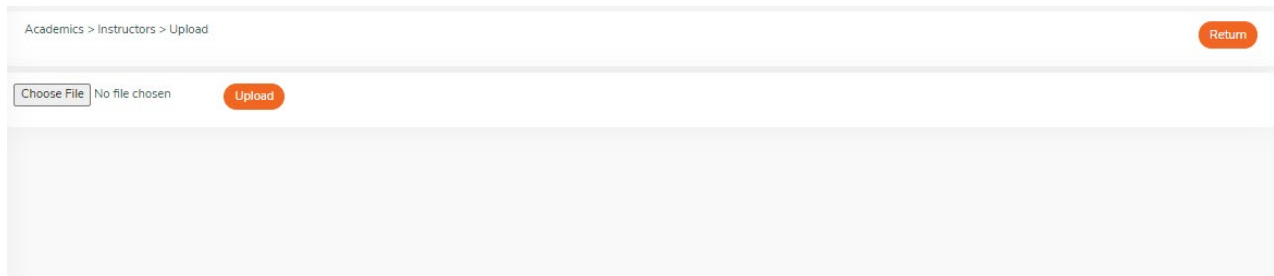
Departments/Divisions

Contact History

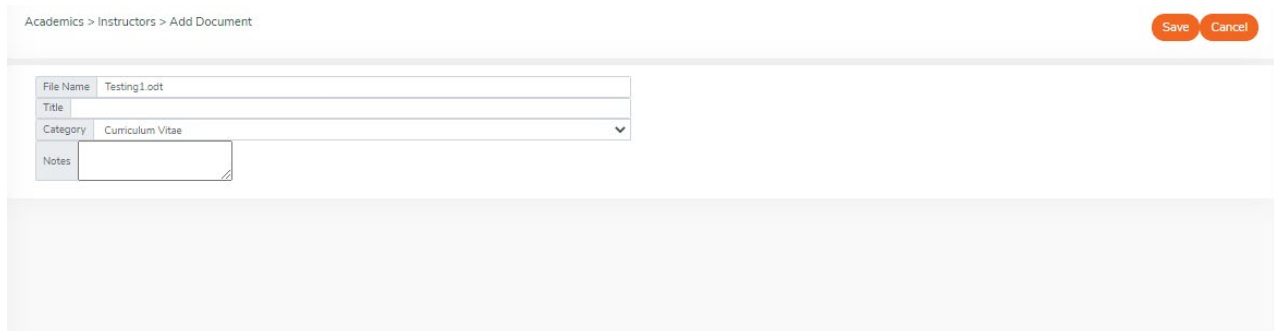
2. Click on the edit button to allow you to add in a new document.



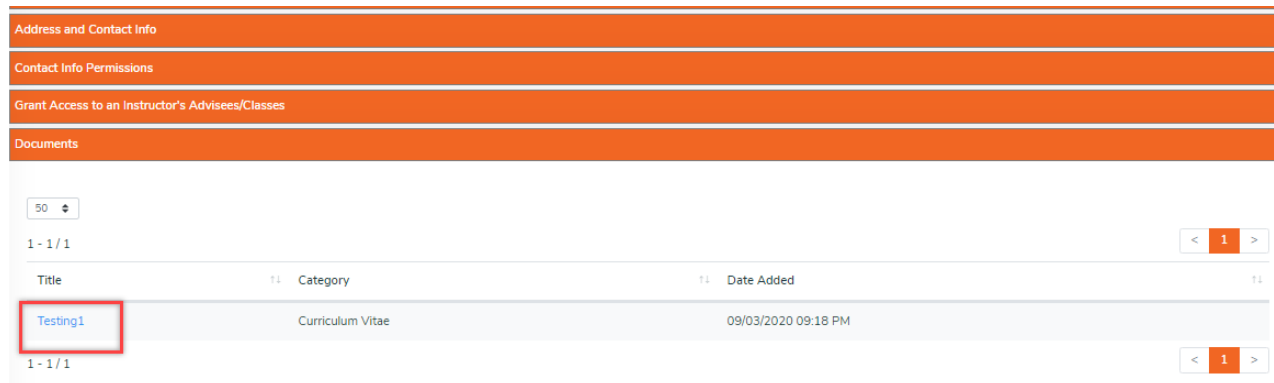
3. Click on the add button down in the Documents group. This will bring you to a page for you to upload the file. Browse and click upload.



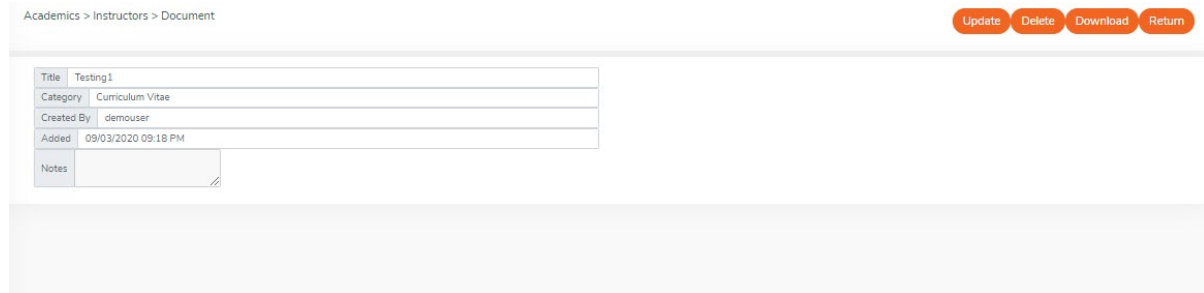
4. This will allow you to add a title and category and any notes for the file.



5. Click save and the document will be added.



- 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.



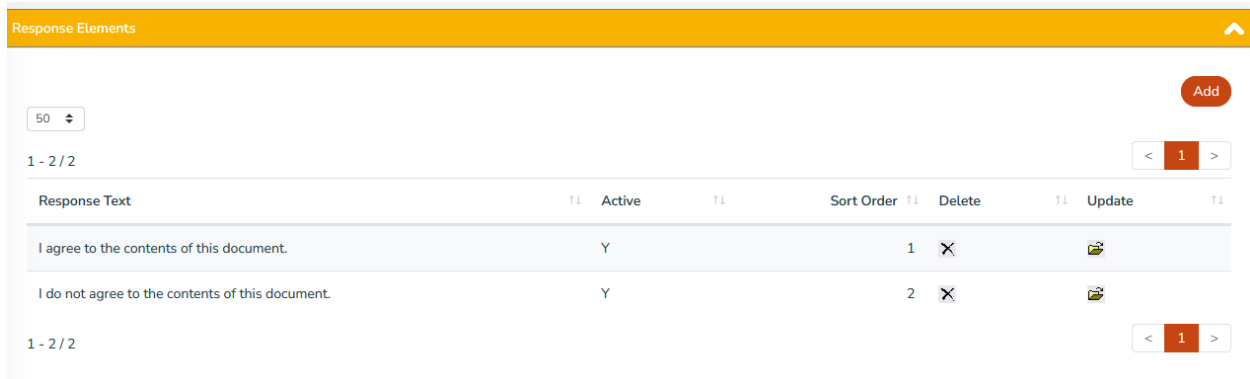
Document Responses

This feature allows for individuals to add predefined tags to a document to which they have access. These tags can be used for many different purposes: indicate a document has been reviewed, agree/disagree with a documents information, as a type of signature, etc. The responses are defined to a category so are available wherever responses have been turned on within the system for that category. A response can only be responded to once by an individual, but for administrative users, all responses can be viewed or deleted. Response translations can be added in the custom translation section of the system.

Responses are available to be used in most areas of the system where documents are available other than in documents for churches and organizations.

Configuring Responses

The specific responses can be added within the normal category area as defined above. Near the bottom you will find a section titled Response Elements. Click the Add button to add in new options.



A few things to note:

- Once a response is in use, it can only be made inactive, it can't be deleted.

2. You can have any number of responses elements for a document category.
3. When adding a new category, one must save the category first, then edit it, to create the response elements.
4. For the student, instructor and alumni portals, you need to tick the box for “Allow Responses” for the button to appear.

Adding Responses

If responses are able for the area in the system and a category where response elements are defined has been used for a document, you will get a button in order to add a response for the document.

Title	Category	Note	Date Added	Responses	View	Delete	Update
Blank	Additional Documentation		21/05/2024 13:10		View	✕	📄
Example Doc	People Response Example		03/07/2024 13:25	0	Response	View	✕

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When one clicks on the response button, they are given the active response element list that they can select from.

Select the best response from the list

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Response	Add
I agree to the contents of this document.	Add
I do not agree to the contents of this document.	Add

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Once selected, the response button disappears (since an individual can only provide one response, personally) and the result number increases.

Title	Category	Note	Date Added	Responses	View	Delete	Update
Blank	Additional Documentation		21/05/2024 13:10		View	✕	📄
Example Doc	People Response Example		03/07/2024 13:25	1	View	✕	📄

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Any number of other individuals with access to the area can also provide their responses and they are viewable here with the number. Also, by editing the category, it is possible to delete any responses that were mistakenly added. Within the Student, Instructor and Alumni portals, it is only possible to see the response the logged in individual has submitted and it is read only.