

# Document Management System User Guide

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*Guide for researchers*

This document gives step-by-step instructions on using the UH Document Management System. A quick reference guide is also available in the Appendix.

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This document was produced as part of the Service Orientated Toolkit for Research Data Management project funded by JISC and based at the University of Hertfordshire.

The contents of this guide for the Document Management System is based on previous how to guides compiled by UH, expanded and updated to include UH specific instructions for using the project file system.

## Introduction

The Document Management System (DMS) is a web-based tool for storing and working on documents related to research projects.

With a standardised file structure ready for your project, and inherent security for sensitive documents, the DMS is an ideal space to store your project documents and data. It is linked to the finance system and automatically provides reports, retention, and version control. Access is easy from on campus, and off site by you and your collaborators.

## Access the Document Management System


The DMS is accessible at

<https://www.docs.herts.ac.uk/>

You will need to enter your UH user name and password to gain access to the DMS.

To exit the DMS, you will need to close your browser – all of it – so consider using a different browser to your usual web access.

## Glossary

DMP:	Data Management Plan
RDM:	Research Data Management
DMS:	Document Management System
IE:	Windows Internet Explorer 

## Starting out with the DMS

To access the Document Management System, you first need to log into the UH staff network. On site, this simply means that you should check that you are connected to the staff network and not the student network. If you are connected to the student network, or if you are off campus, then you need to connect to the staff network using the UH Portal.

### Access the VPN

From the UH Net website:

<https://unvpn.herts.ac.uk>

log in using your staff id and password attaching '@staff' to your user name (e.g. ab12aaa@staff).

### Log into the DMS


To use the DMS with all of its features, you should use Internet Explorer. So open the IE browser for your DMS session and go to the UH DMS website:

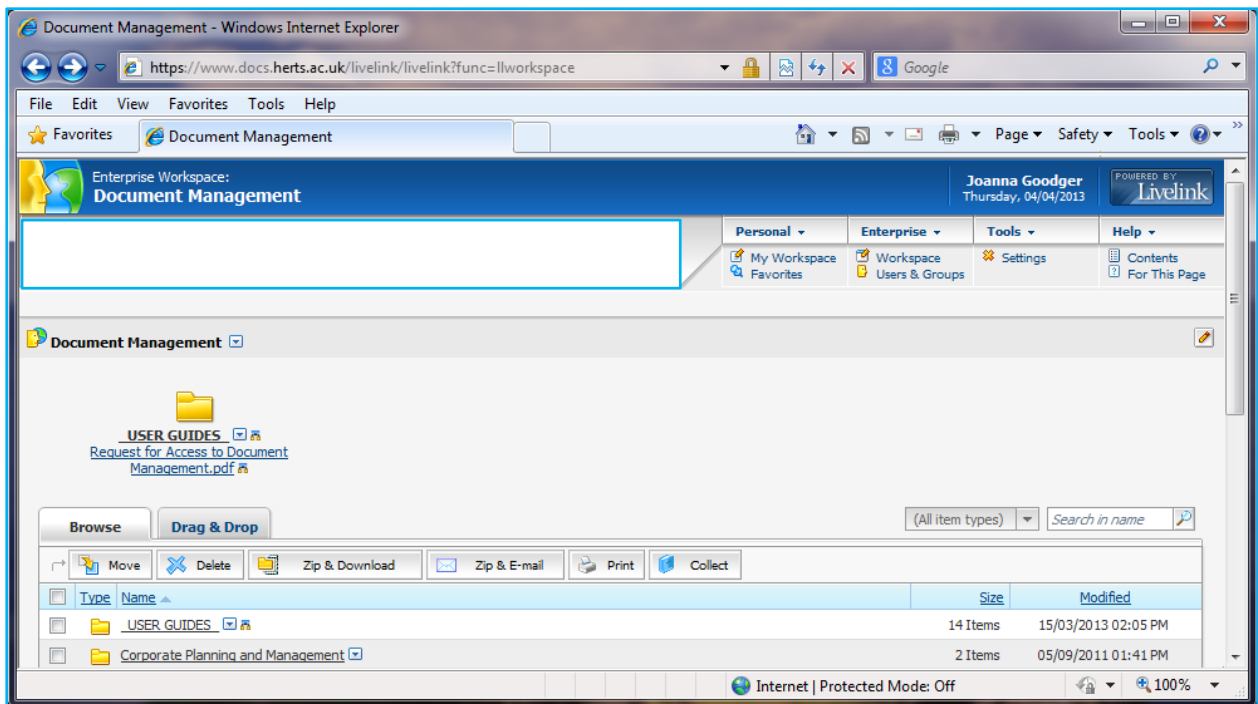
<https://www.docs.herts.ac.uk>

Again, log in using your staff id and password. This session will stay open until you close the browser.

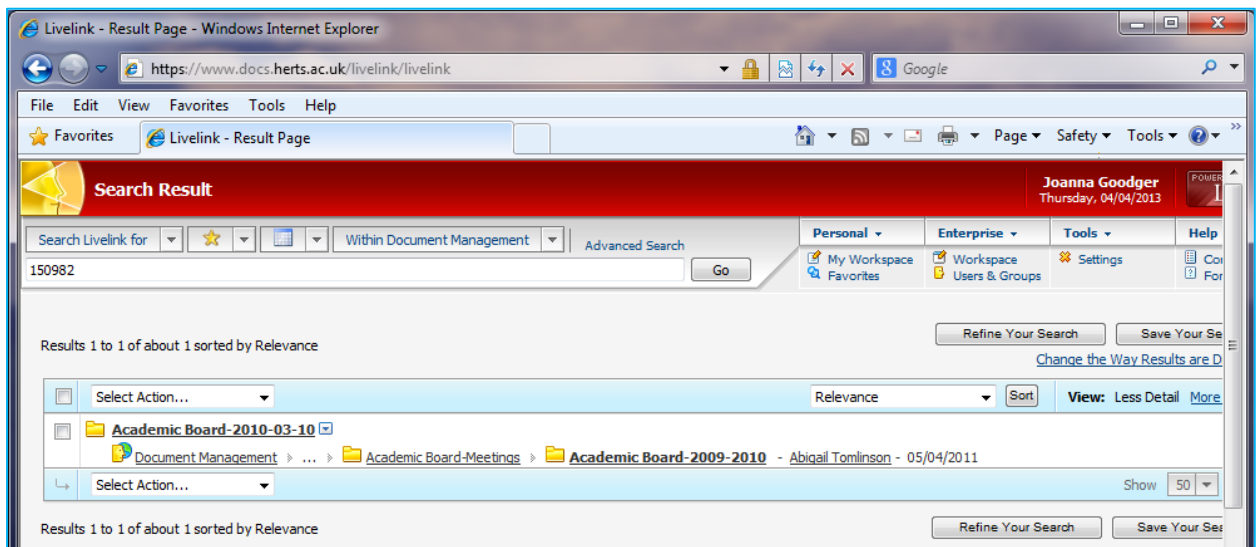
## Search for a document

When you have logged in to the DMS, you will be presented with a list of files and folders in the DMS. You should navigate to your project directory where you'll be presented with the files pertaining to your project. You can also access this directory using a direct link.

The DMS is fully text searchable, but with the document number you can limit the documents returned by the search. Enter the number into the 'Search Livelink for' bar (highlighted below). You can include all of the DMS, or just your project, or the current directory using the options. You can search for part of a word using an asterisk (\*) for the missing prefix/suffix, or a phrase by surrounding the text with quotes around "all of this", or for specific document types: 

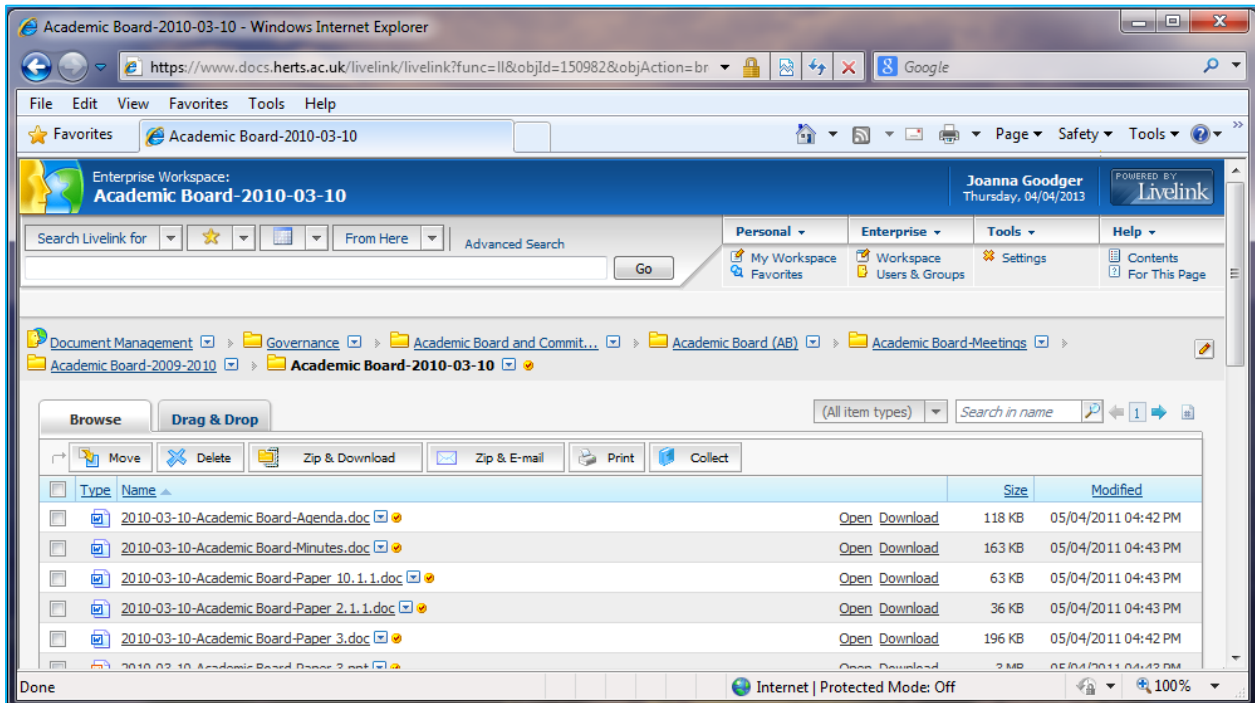


The search results are displayed below in the main body area. The header will also change to show that the search is complete.



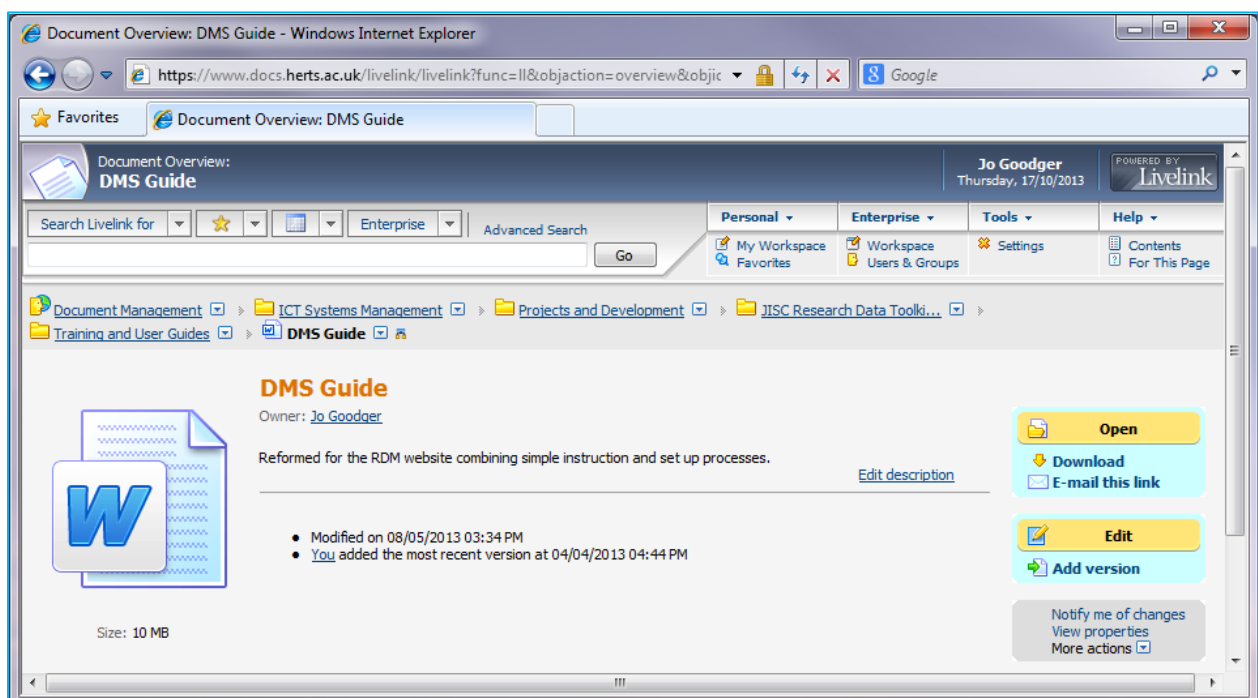
## Sharing a document

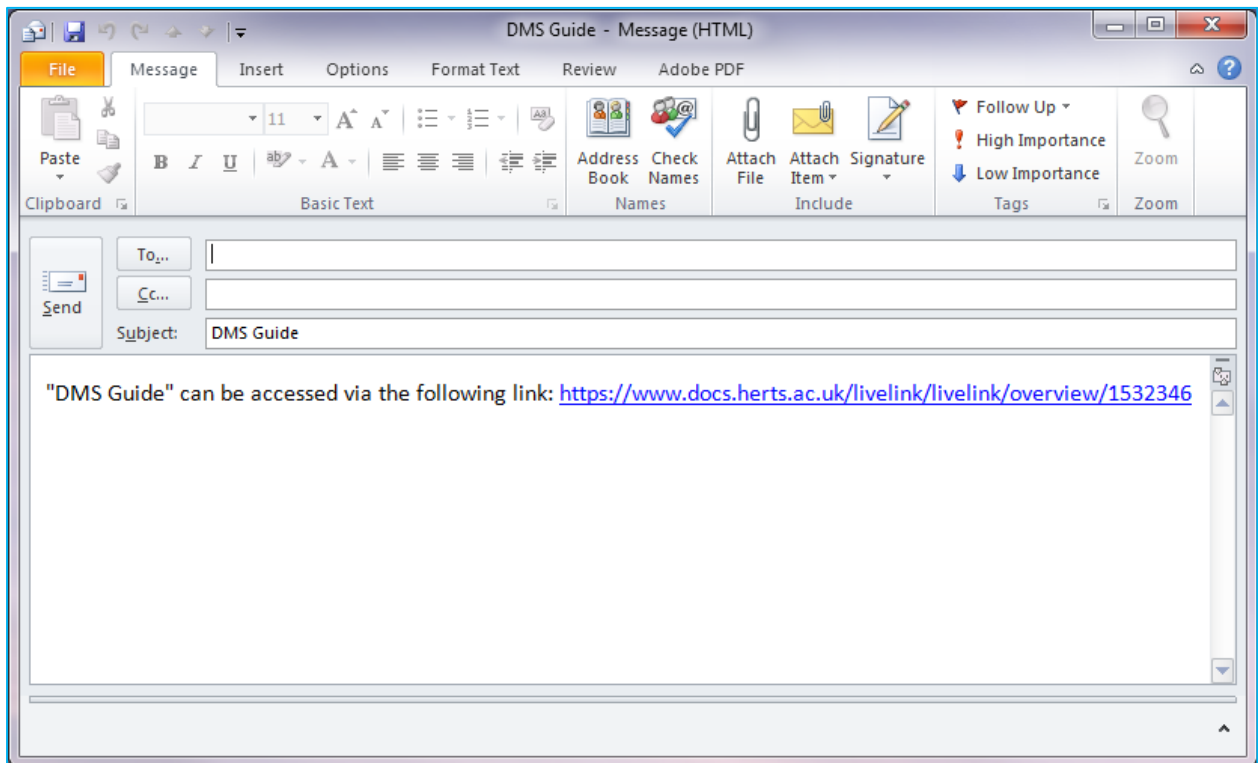
When you select the folder that you're looking for, you will be presented with the contents if you have access.



A direct link can be emailed to your colleagues who can either follow the link from your email, or use the document number (150982 below) to search for the document in the DMS.

Double click on the file to bring up the file information. On the right hand side of the window is the option to 'E-mail this link'. This will open outlook and include a link to the file.

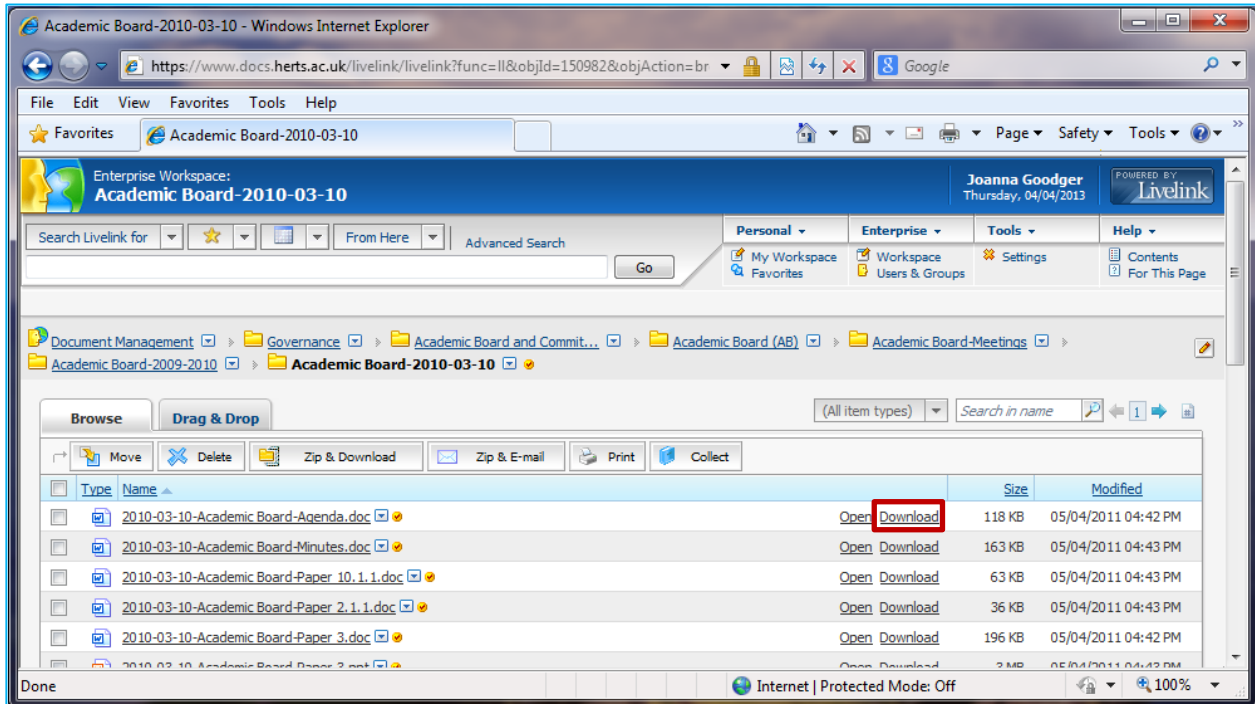




You colleagues can now go direct to the file. They need to be able to access the DMS to open the file. If they are external collaborators, you need to register them as visiting members and grant them access to your project area to view your project files. Access is on a per folder basis so they will only be able to view what you allow them to see.

## Viewing a document

Once you have found the document you want, you can download the document simply by selecting 'download' from the options to the right of the file; however, changes you make will not be saved to the server, only to your temporary file. A more robust method is using the **Drag & Drop** function (page 9).



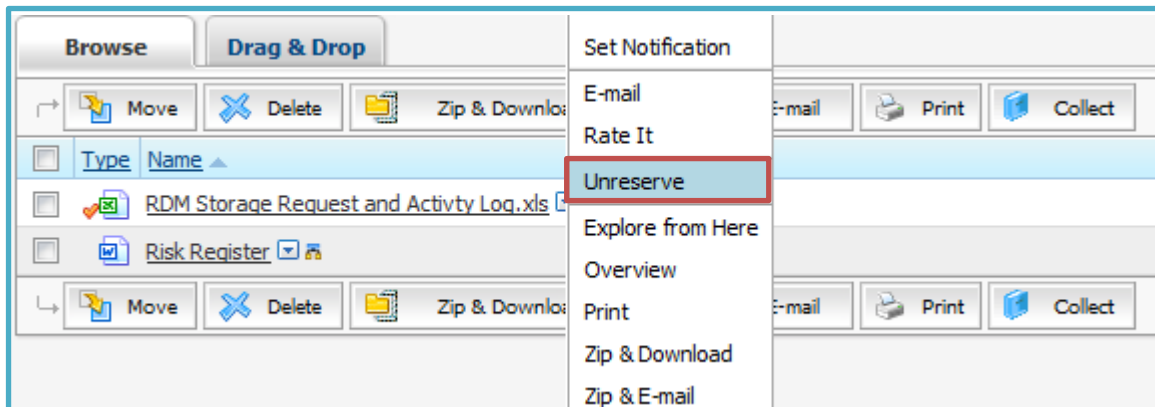
If you have access permission, you can download the document for editing but you need to enable the browser settings on pages 10-14..


Downloading the file will lock the document to others in your project until you close it so that only one person can edit it at a time. This version control ensures that edits are made to a single document, and that your group does not end up with a dozen slightly different copies of the same file.

However, when you **save** your edited file, it will **not update the file on the server**. It will instead prompt you when you **close** the file asking whether you want to update the server file.

You should use the **Drag and Drop** method for editing files; however this currently only works on Internet Explorer version 9, and firefox.





You also need to ensure that the file is reopened for editing. A red tick next to the icon  indicates that the file is locked by someone else. To open the file to editing, select '**Unreserve**' from the drop down menu next to the file name.

You will be asked to confirm that you wish you unlock the file so make sure that you're ready.

## Drag and Drop

The Drag & Drop function on DMS is far easier to use to manage your files than the browser and is therefore recommended for opening and editing files.

If you're using Windows Internet Explorer (IE) version 9, you need to change the browser settings to activate the Drag & Drop functions – see the next page (page 10). **IE version 10, does not currently support Drag and Drop.**

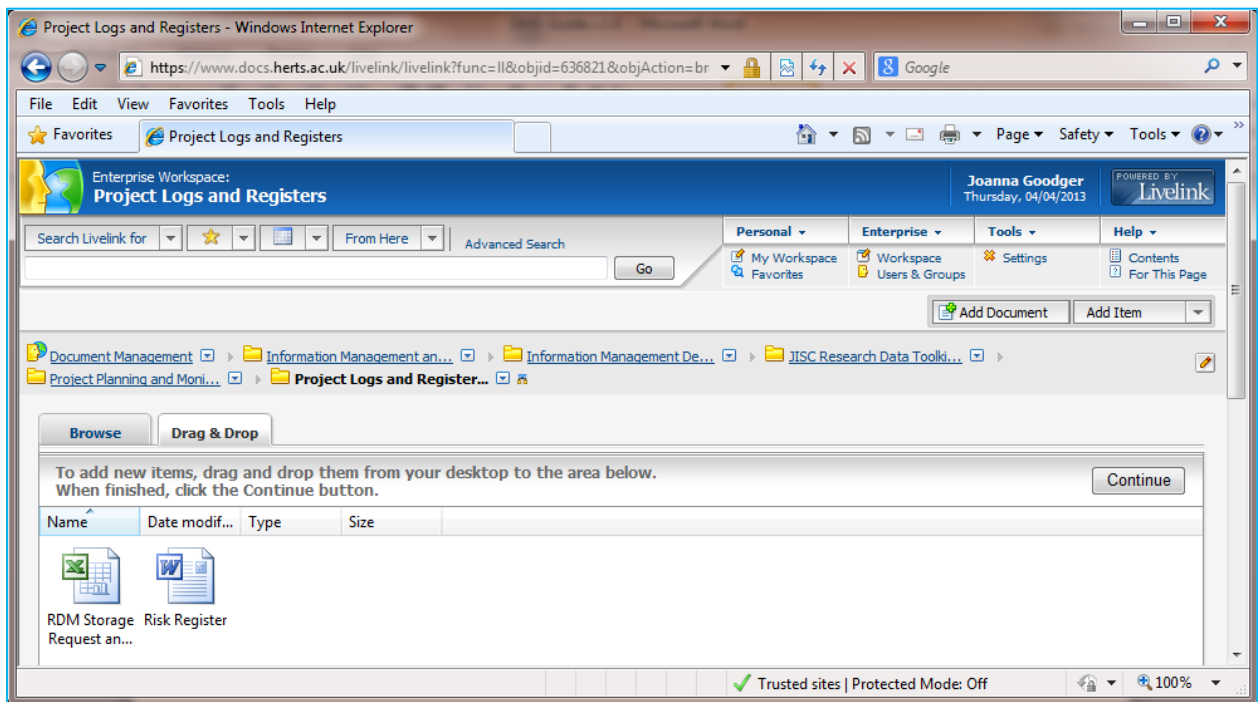
If you are using Firefox 11 you need to install WebDAV View, which you are prompted to do when you select the Drag & Drop tab. Full instruction for Firefox settings on page 12. **Firefox is not compatible with the UH Student Record classic interface.**

Once you have set up the browser settings, you can use Drag and Drop as you would between normal windows.

can now double click to open a file, which will activate the version control and prevent others from simultaneously editing the file, and you can drag it to the desktop to download the file as you would with files on your computer.

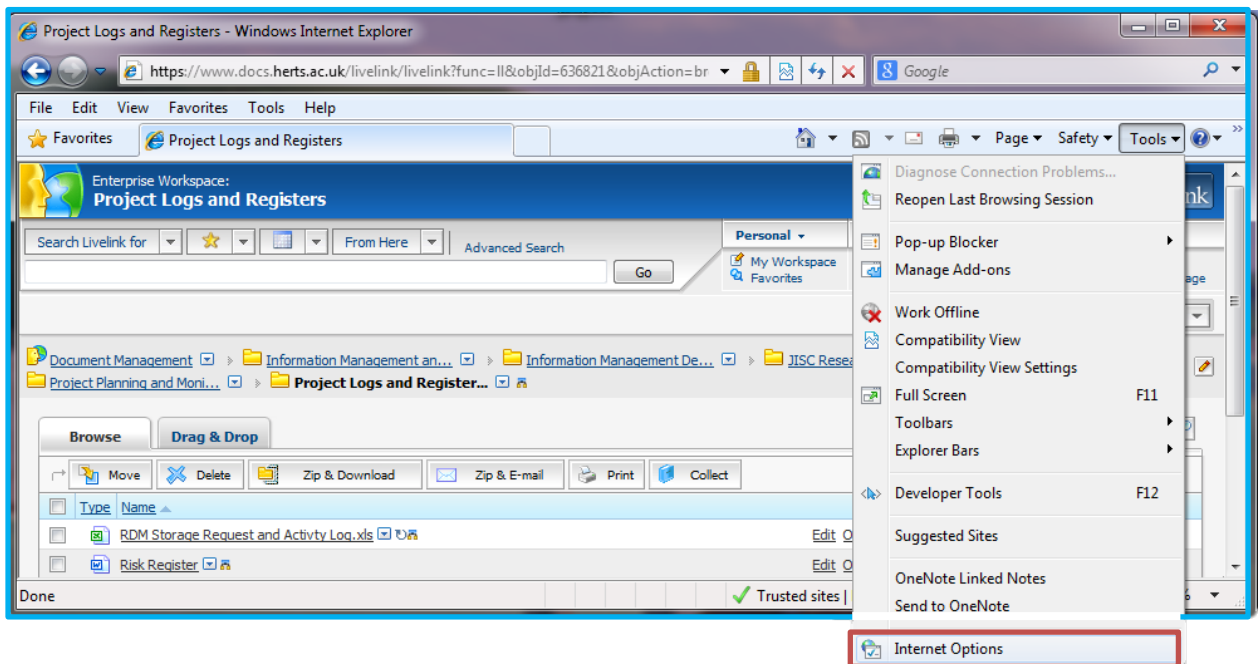
You will be asked for your user name and password again to begin editing the file, which adds security to your files.

This method **automatically saves your files to the server** and not a local disk.



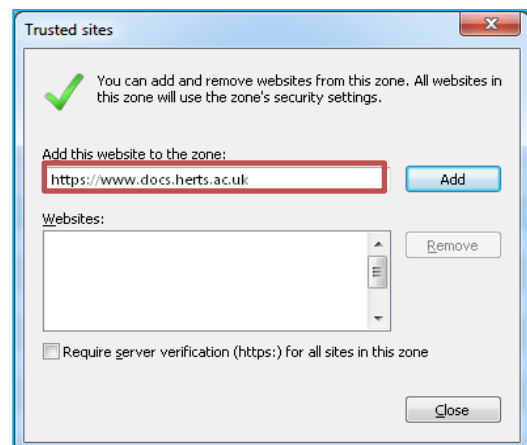
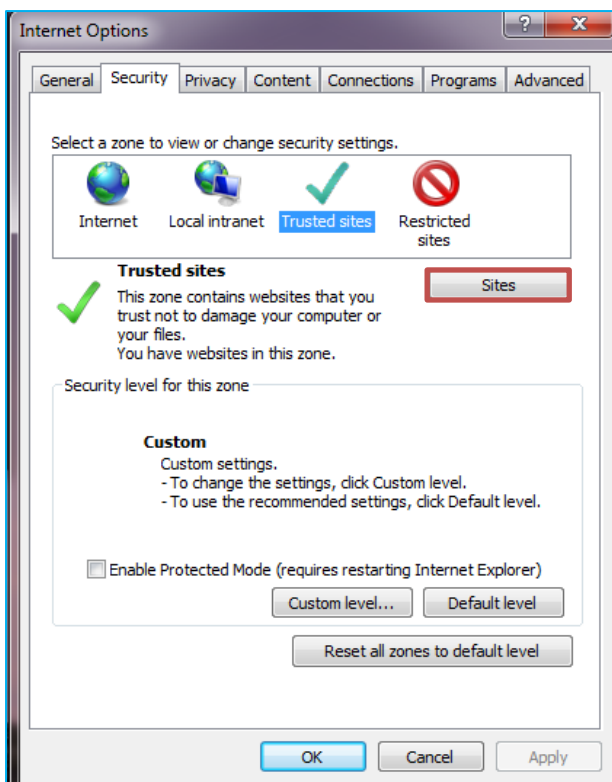
## Internet Explorer browser settings

To change the browser settings, choose 'Internet Options' from the Tools menu:




On the **Security** tab, select the 'Trusted Sites'  zone so that the description is displayed and the **Sites** button is available. Select the **Sites** button to bring up the list of trusted sites.

Check that <https://www.docs.herts.ac.uk> is listed; if it is not, add it to the list of trusted sites and **Close** the 'Trusted sites' pop-up window.



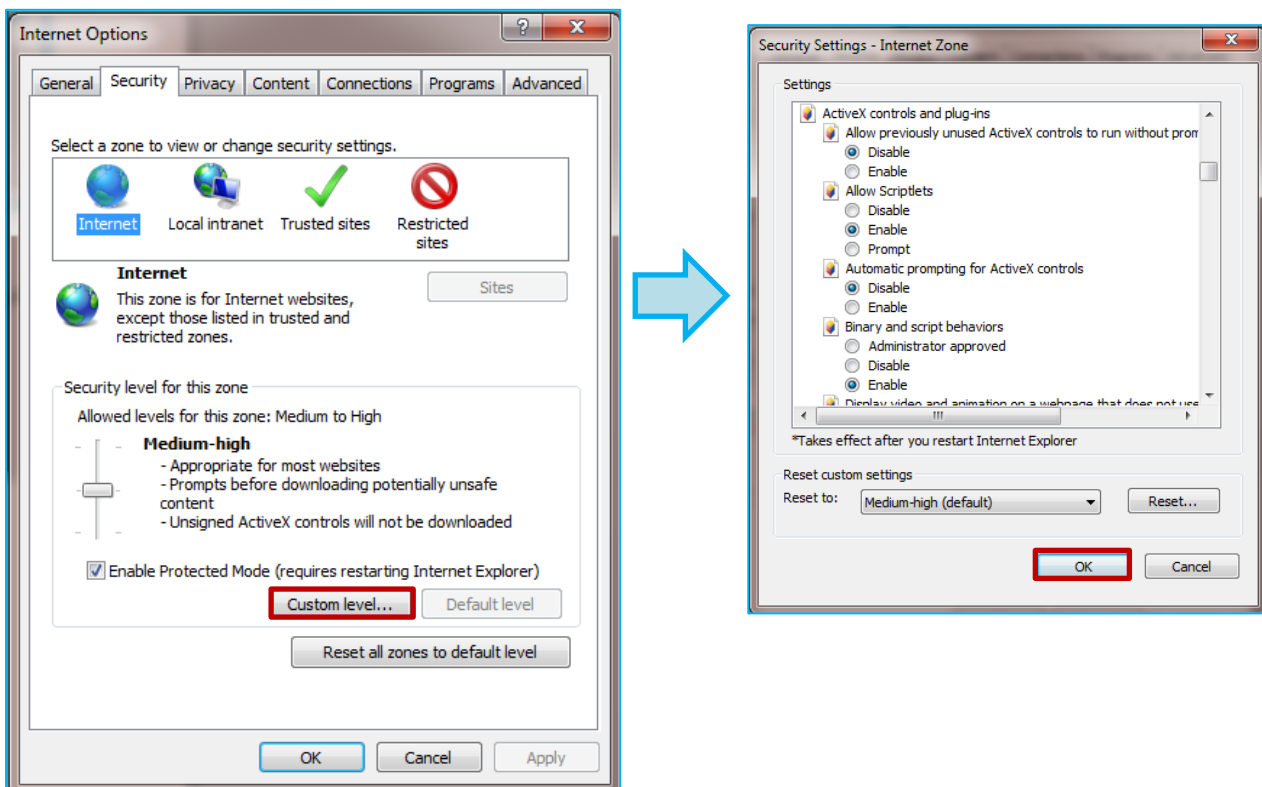
You also need to customise your security levels.

Select the 'Internet'  zone and select the 'Custom level...' button.

In this Security Settings window, scroll down to the **ActiveX controls and plug-ins**. Check that:

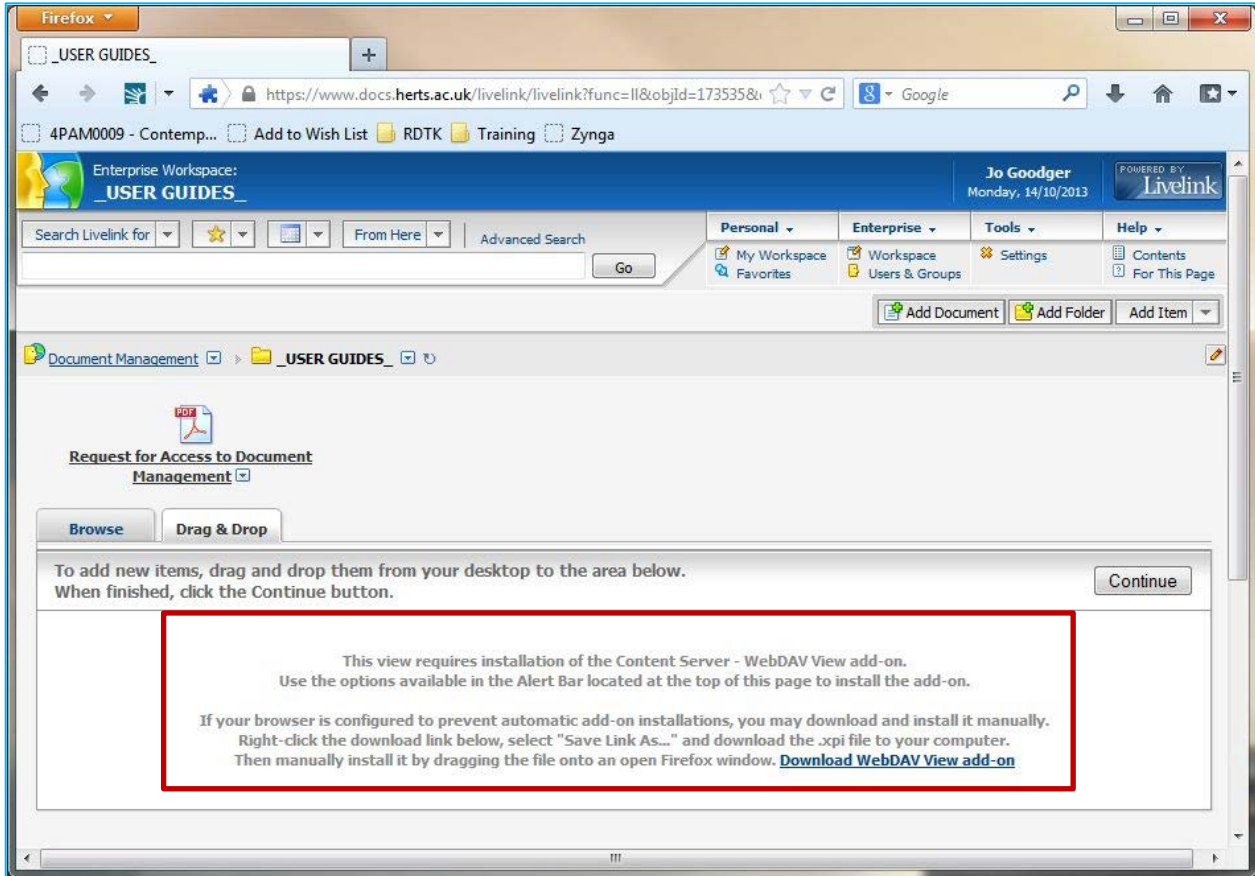
- Allow Scriptlets = Enable
- Download signed ActiveX controls = Enable
- Run ActiveX controls and plug-ins = Enable

When all are enabled, select **OK** on the Security settings pop-up window, then **Apply** on the Internet Options window.

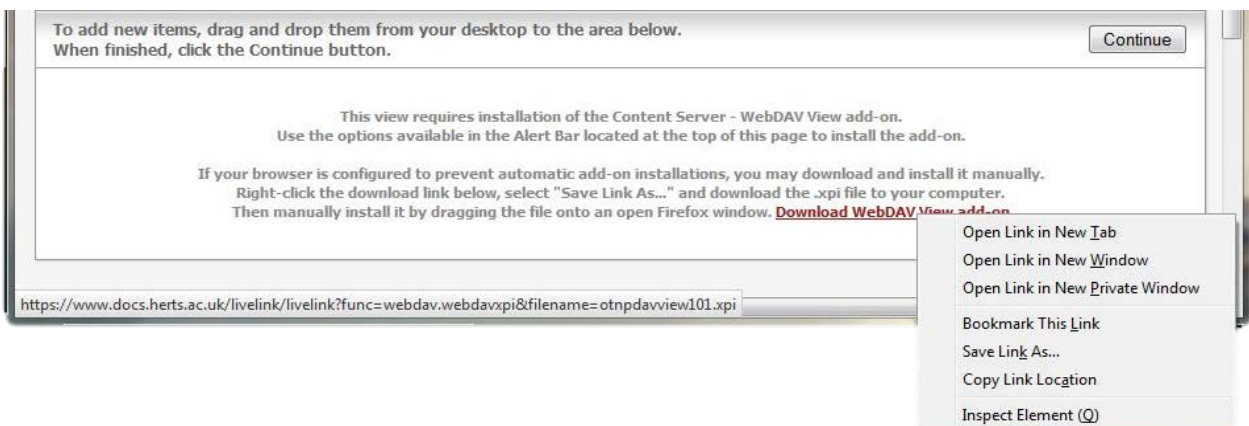


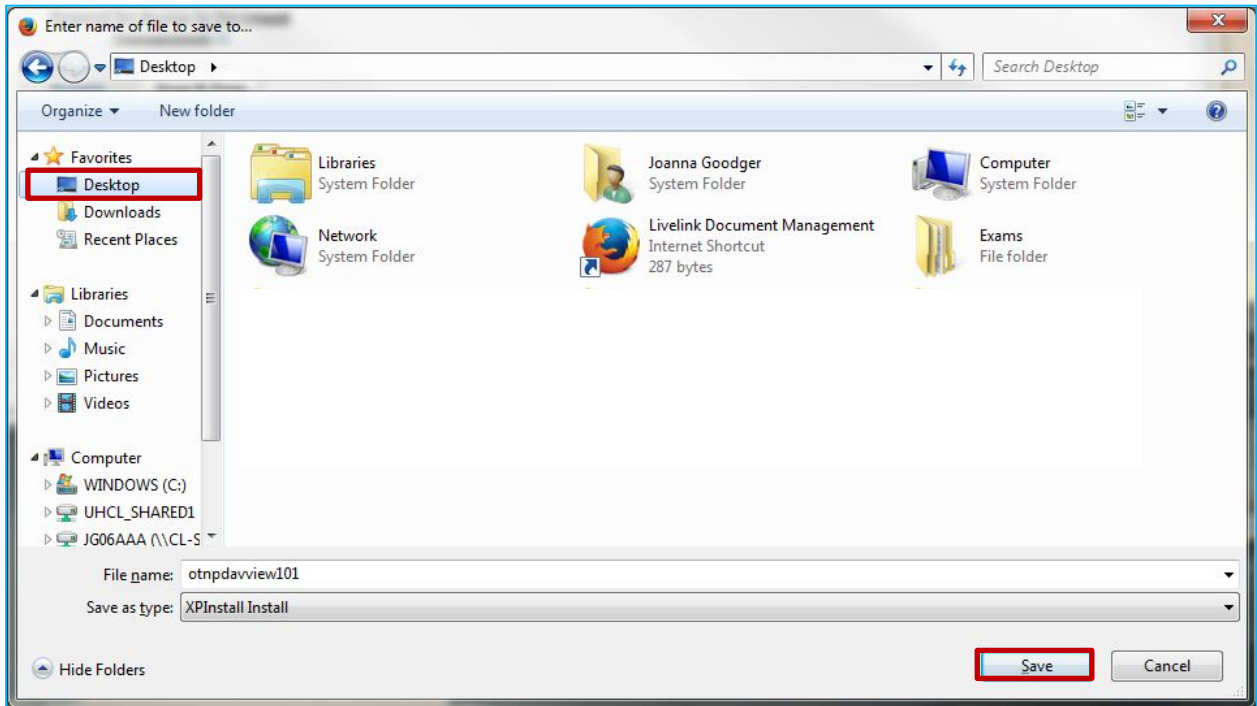
## Firefox browser settings

If you are using firefox 11 you need to install WebDAV View, which you are prompted to do when you select the Drag & Drop tab.

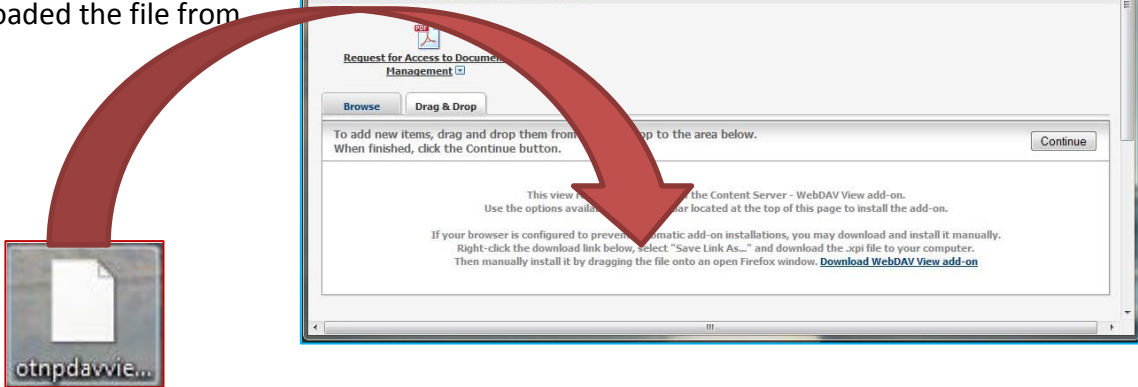


You need to save the link to your desktop so that you can drag it into the window. So right click on the link and select 'Save Link As...'.

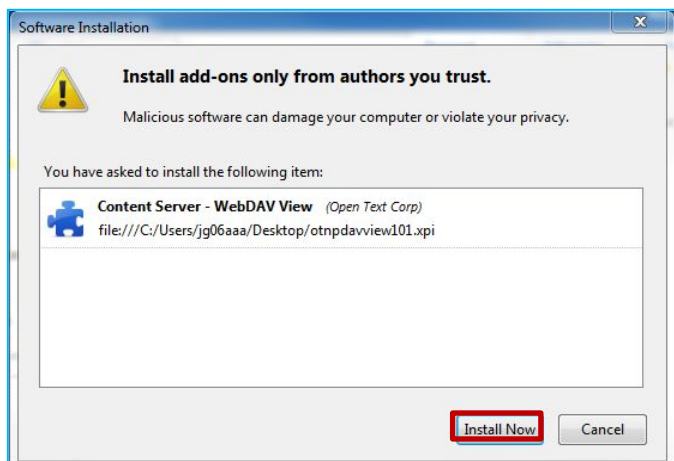


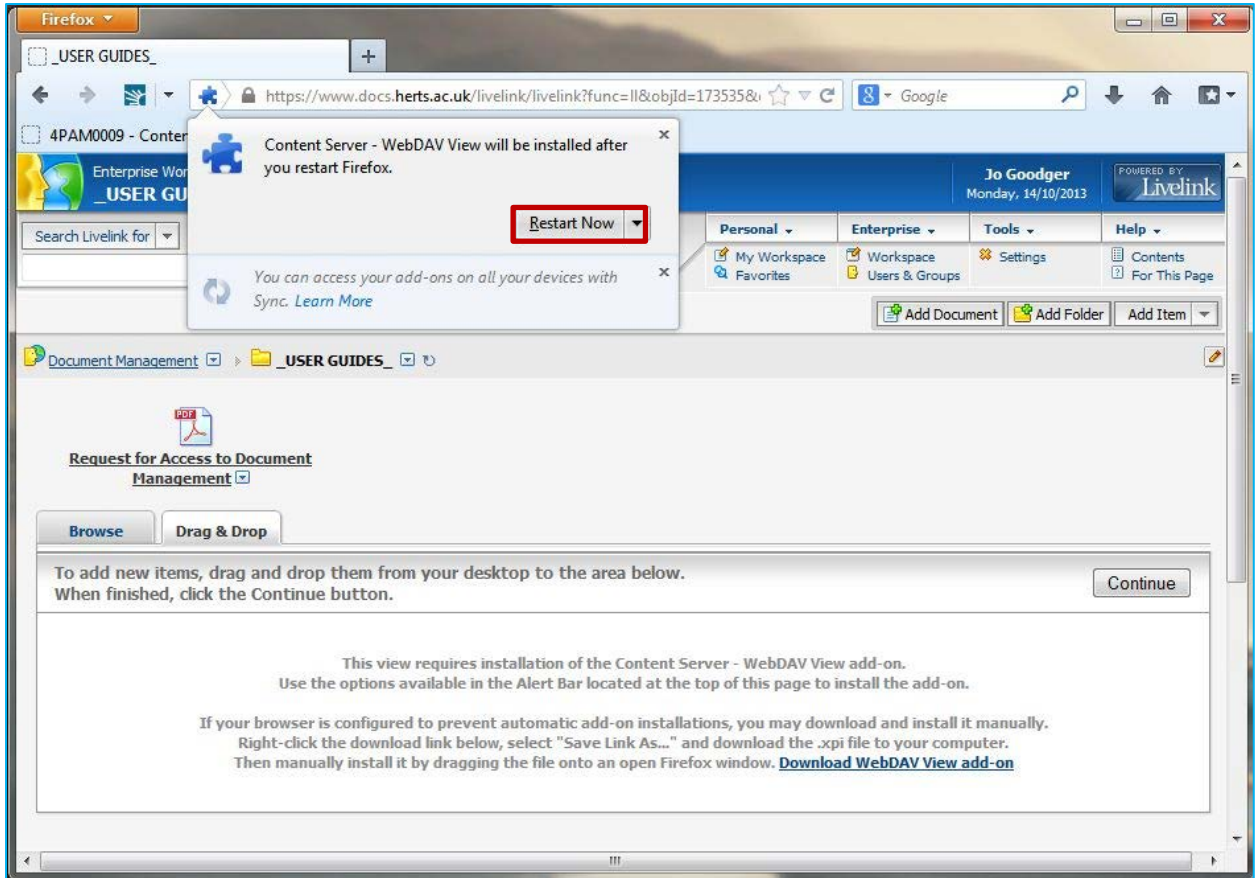


Select the file from your desktop and drag it into the browser window where you downloaded the file from

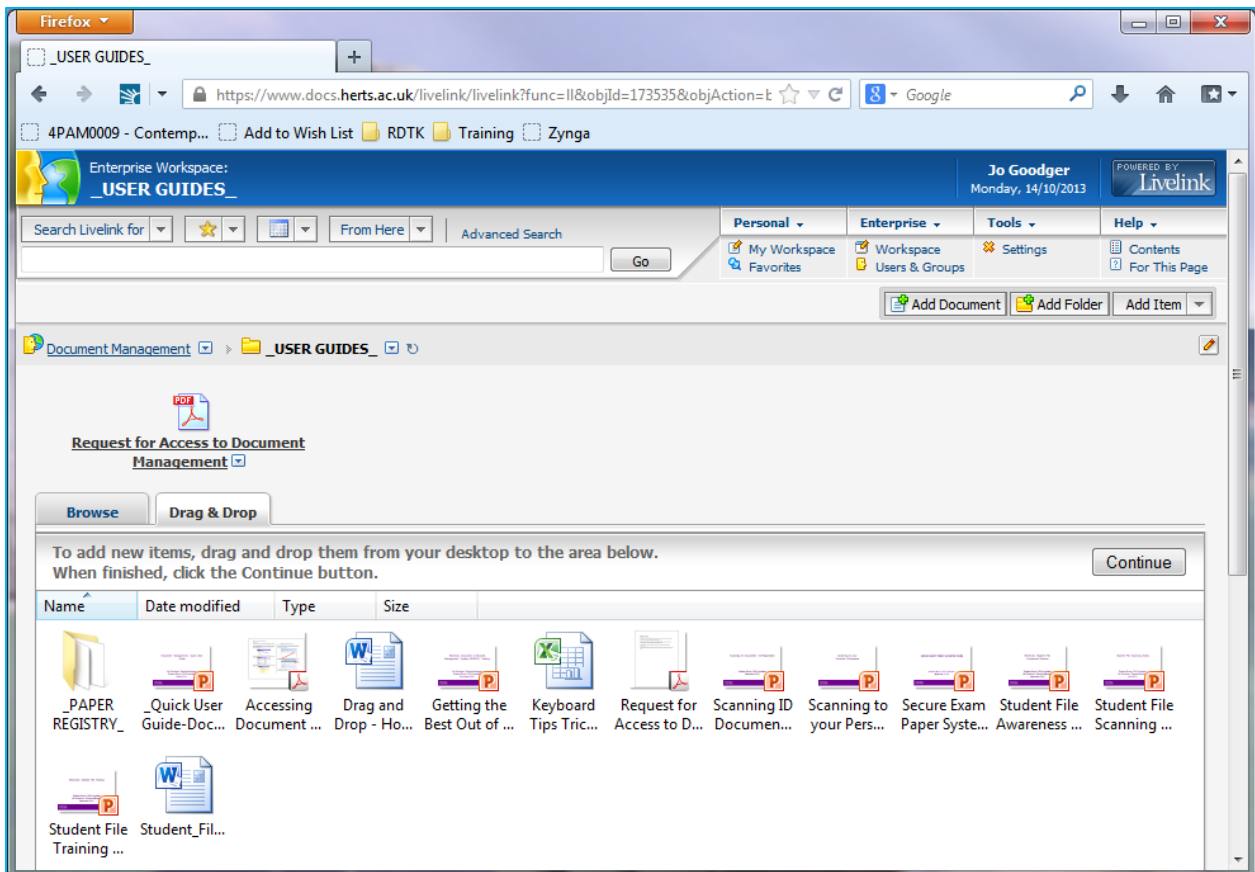


Install the file as prompted then allow firefox to restart. Your other windows should also be restored after the restart.



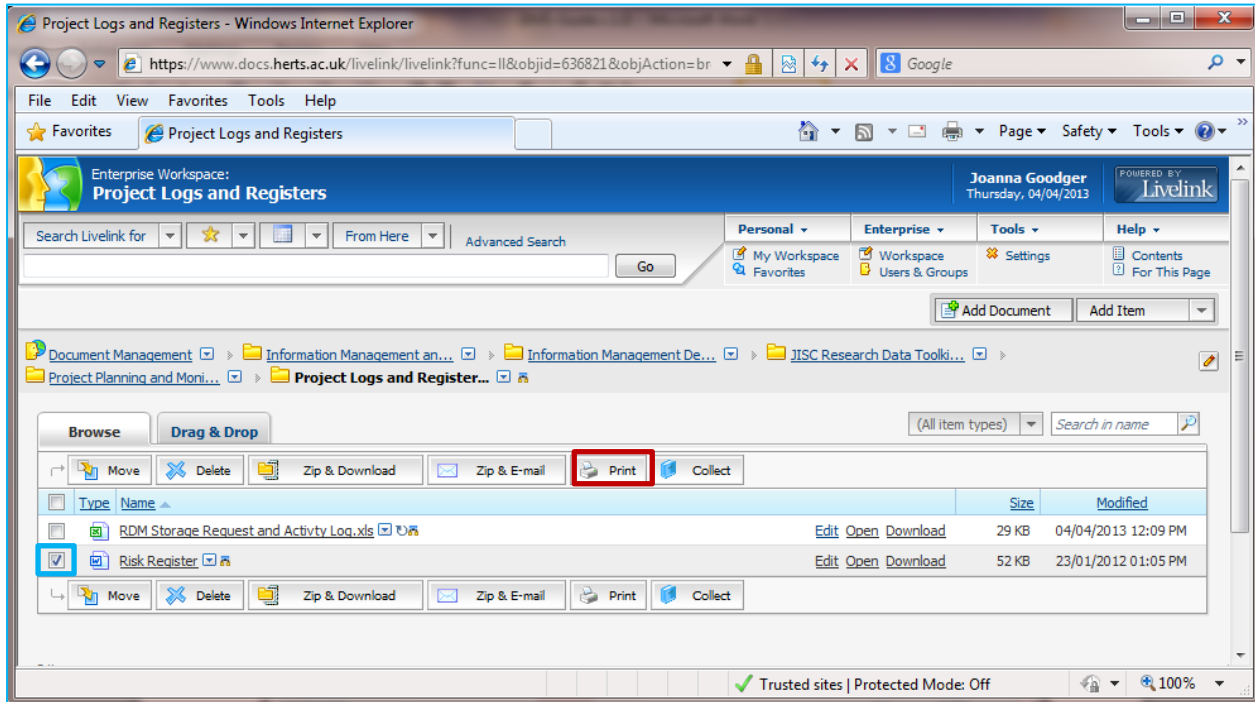


After the restart, you will see the files in the drag and drop area:



## Printing Documents

There is no need to download documents before printing; they can be printed direct from the DMS. You just need to select the item using the check-boxes to the left of the file name. Then select 'Print' from just above the file list.

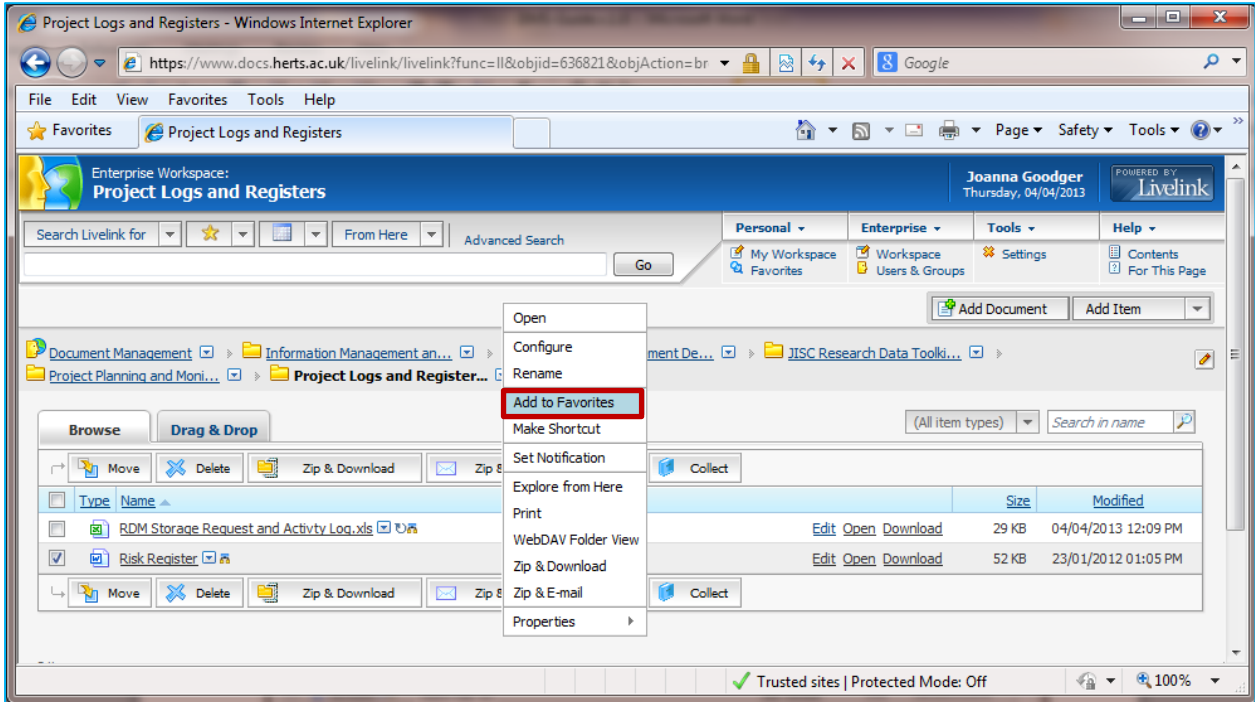


Alternatively, you can open the file and print as you would a document that you have been working on.



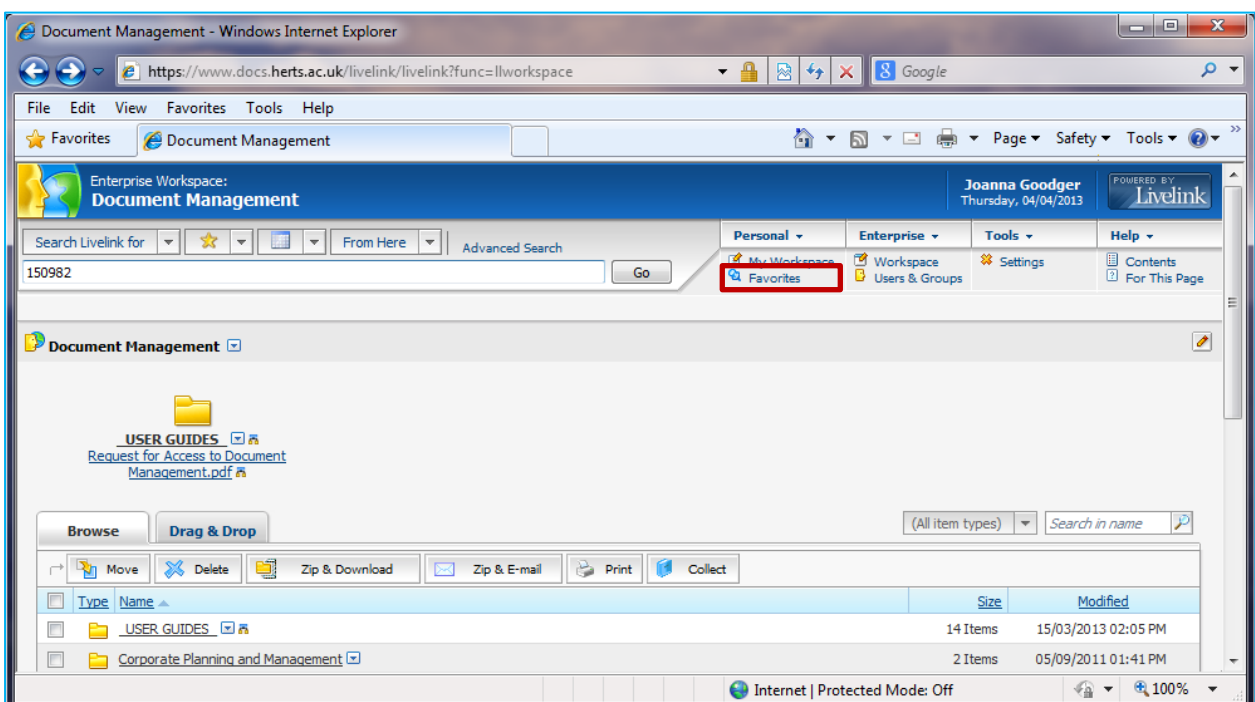
## Favourite Locations

You can select folders as your favourites so that you can get to them quickly. First, you need to access the folder you want to add. Next to the directory on the bread-crumbs chain is a drop-down menu. You can select 'add to favourite' here. This location will then be added to your list of favourites.



This menu also gives you the option of 'making a shortcut' which you can use to attach this folder to a directory higher up in your hierarchy.

Your favourite directories are listed in [Favorites](#) just below your personal folders.



## A Reference Guide to the DMS: Important Features

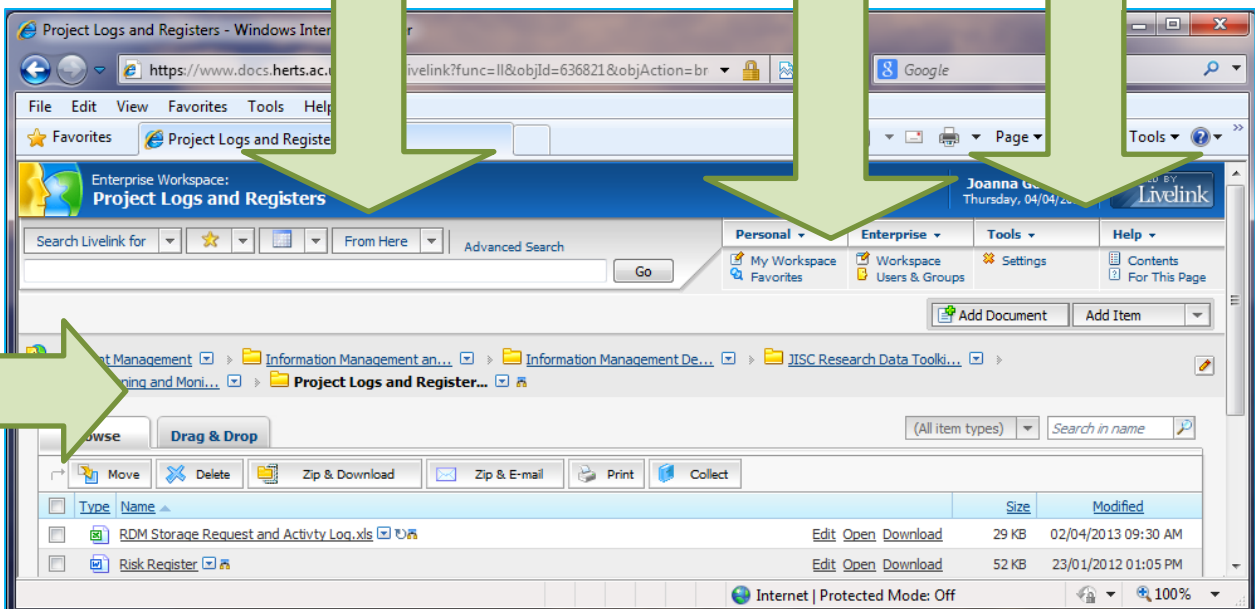
Drag & Drop is the best way of editing and moving files.

Change your settings now to turn on ActiveX.

Search the DMS, your project, or your directory using the search LiveLink for dialog box, using \* for missing part words, quotes "for phrases", and limiting the file types searched for using the ★ menu.

Save directories to your favourites and you can jump to it from the main DMS page using your **Favorites** space.

Change your settings to turn on ActiveX.



Select a document to print, move or email using the check boxes.

Then select an action from above the list of files.

This is easier using the **Drag & Drop** function above.

You can Open and Download the files direct from the DMS.

Opening it will show you a read only file.

Choose Edit to activate version control and lock it while you have the file open in an editable mode.

<https://www.docs.herts.ac.uk>