Active Steward™ Document Management System (DMS) - Overview

(Penman Consulting Training material, June 2016)

This is an overview/training reminder/crib sheet. More detailed help is available on all topics in Active Steward™ via Menu > Help > How-To Articles (search for "document")

About the DMS

- *Does it belong?* Active Steward is best used to share docs which are related to a product or constituent, in final form, still relevant and likely to be viewed and shared occasionally.
- Documents are stored by type (meeting minutes, study reports, IUCLID output, etc.) and each type has its own set of attributes.
- Not only "documents" can be stored - also zip files of deliverables, i5z files, etc.
- See an overview of document numbers and recently viewed documents on the Home Page.

Add Documents

- Docs can be added via:
    - Home Page
    - `main menu > documents > add`
    - Product/Constituent/Legal-Entity record > documents tab (with some data pre-filled)
    - Email inbox
- When adding documents by all methods:
    - *Use a descriptive document name*. Pressing the "use file name" button *should* be okay, because file names *should* be descriptive, but often they're not.
    - Select the right document type
    - Fill in all the attributes possible, with meaningful data, including expiry and retention dates
    - Make lots of database links where possible (link to relevant Products, Constituents, Legal-Entities).
    - Use tags wisely: don't repeat data in other attributes, agree tags with others, but do use them.
    - Check if an older version exists - if so, it may need archiving.
- When importing documents by email, follow the rules for inbox cleanup in your project/consortium. If in doubt, immediately import and then clean up your own emails from the inbox...
    - *don't leave your email in the inbox for somebody else to import and clean up, it may be considered rude*.

Document Management

Each project should have a system to manage documents in Active Steward™

- When adding a document consider if an older version needs archiving.
- Project Managers can ask for a database report of documents past their expiry/retention dates.

Search/Find Documents

- Search for documents in several places:
  - Home Page (recent docs and a link to document search page)
  - `main menu > documents > search`
  - Product/Constituent/Legal-Entity record > documents tab (with some data pre-filled)
- Search for documents by attribute or by content (a help file is available)
- Advanced search is available with variable fuzziness etc. Rarely needed. (A help file is available)

Edit Document Records

To edit a document record -- its stored attributes -- first find it via search (see above).

- Open the slider/chevron on the search result and click "edit" to change the document attributes, or click "archive" to remove the document from normal visibility and all searches.

Share Documents

- To share documents with colleagues and other Active Steward™ users, use the chin-link icon in document search results. They must be logged in to use the link you send them.
- To share with "external" users - those who are not/cannot log into Active Steward:
  - If a single-use, "disposable" link, with no login or password required, is secure enough, then use `main menu > Documents > Document Links` and follow the wizard.
    - You will still be able to track if the document link has been used by the recipient.
  - If the security of a login and password is vital, as well as receipt tracking, then use a Campaign - beyond the scope of this document.