

## How to create a login to the new site: [www.acsgcipr.org](http://www.acsgcipr.org)

1. Go to [www.acsgcipr.org](http://www.acsgcipr.org)
2. Select the last button on the left navigation. The symbol is a person with a plus sign, and it says register on the hover over.



Figure 1: Shows where to click to create a new login.

3. You should be on <https://members.acsgcipr.org/register/>  
Fill in your Name, Email and create a password. This is a new login and password not associated with any of the previous sites. YOU MUST USE YOUR WORK EMAIL ADDRESS, or the system will not automatically recognize you as a Roundtable member.
4. Click submit.
5. You should now be directed to this page: <https://members.acsgcipr.org/wp-login.php>
6. Using your newly created password, login to the site. By selecting remember me, your browser will remember your login credentials making it possible to come back to the site without logging in each time. However, this is less secure, and not recommended if you are on a shared computer.
7. When you are logged in, you should see this page: <https://members.acsgcipr.org/>  
You should see a log out option on the top right under the search bar. The Document Management System, highlighted by a red box below, is where you click to access the files. PLEASE ENABLE POP UPS FOR THIS SITE, as the Document Management System will open in a new tab in your browser.

## How to sign in to [www.acsgcipr.org](http://www.acsgcipr.org)

1. If you have already created a login using the method above, when you go to [www.acsgcipr.org](http://www.acsgcipr.org), you can use the big green button at the top right that says member login.
2. This will take you to the [login page](#) where you can enter your credentials.

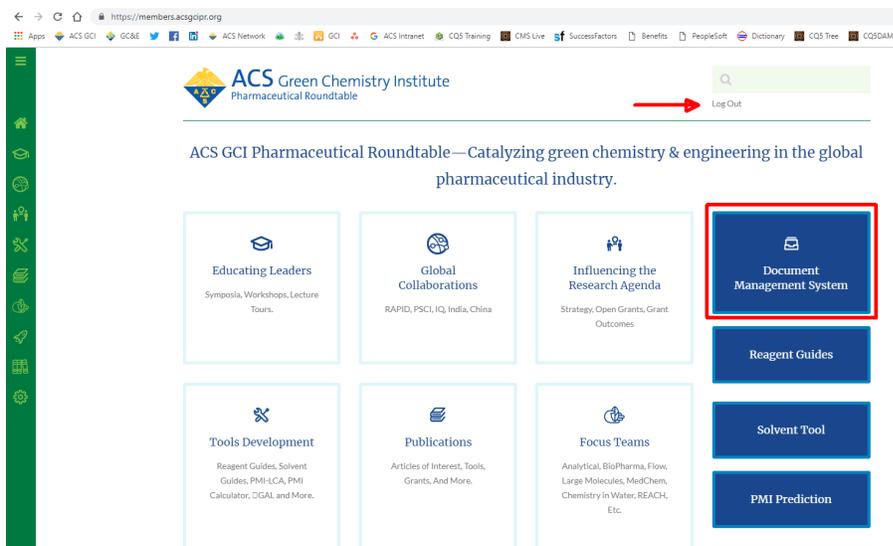


Figure 2: Shows logged in screen and location of Log Out link and Document Management System.

## Instructions to use the new Document Management System (DMS)

Understanding where everything is

1. The image below provides tips on what you see when you first arrive in the DMS.

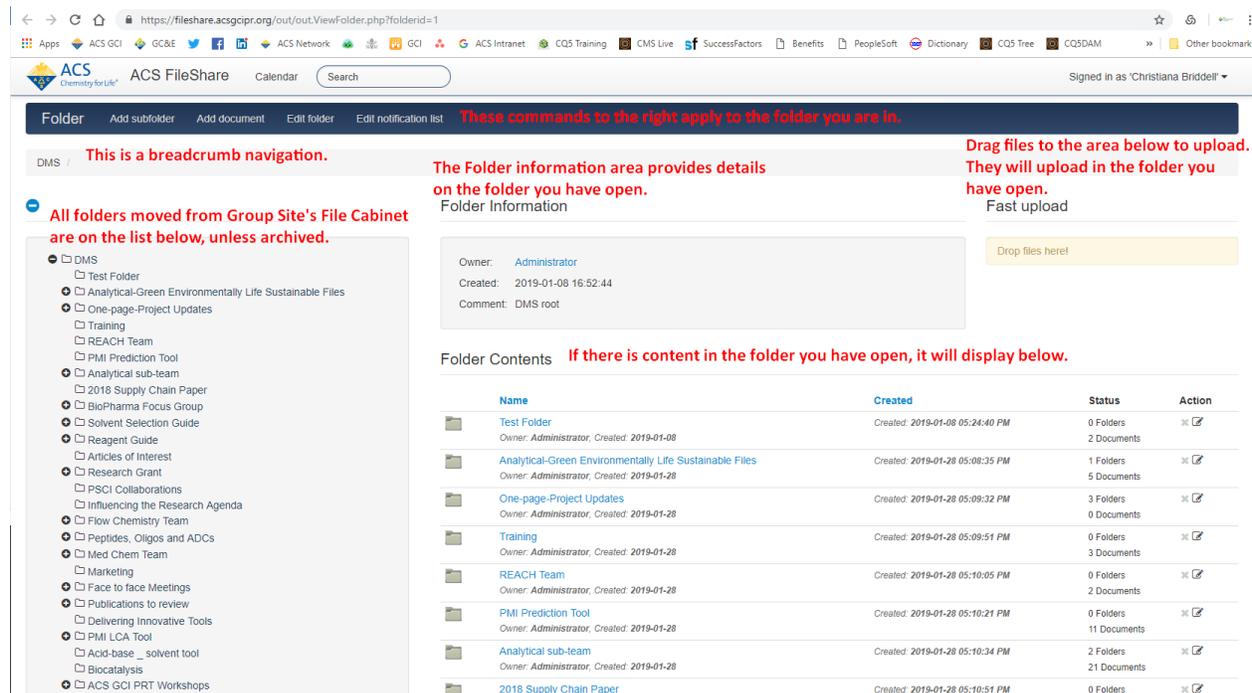


Figure 3: Shows layout of DMS.

## How to navigate the folder listing

1. Use the file structure on the left to select and open files.
  - There is a plus symbol next to each folder that has folders within it. You can navigate to a subfolder by clicking on the plus sign without opening the folder. Open folders will show a minus sign.

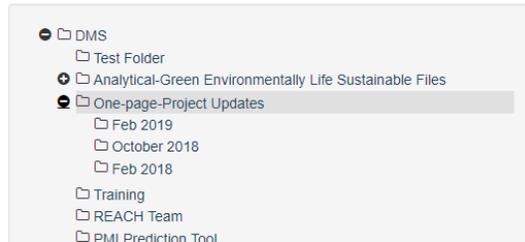
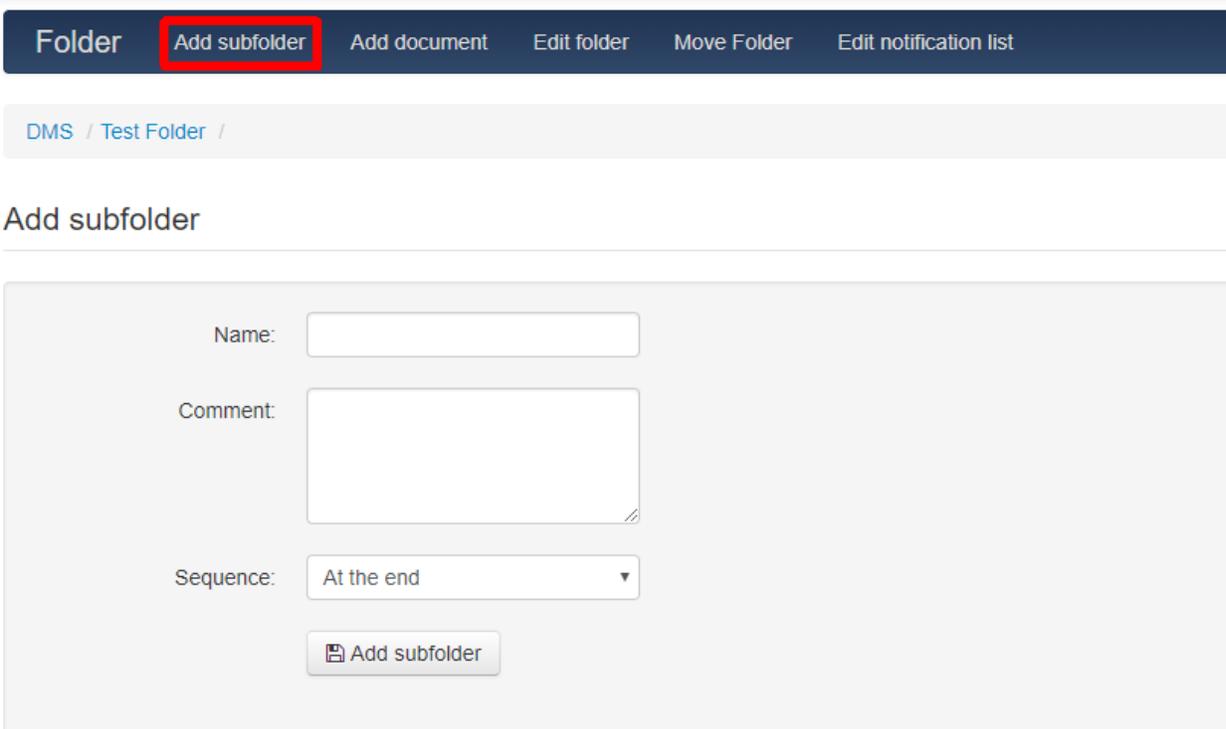


Figure 4: Shows a folder open on the left navigation which has subfolders within it.

## How to add a subfolder

1. In the left list of folders, click on the folder you want to add the subfolder too. If it will be a top level folder, you would click on the DMS folder.
2. Click on **Add subfolder** in the blue bar at the top of the screen (see below).
3. Name your subfolder. You can describe your subfolder in the comment section if you would like. Click add subfolder.



Folder **Add subfolder** Add document Edit folder Move Folder Edit notification list

DMS / Test Folder /

### Add subfolder

Name:

Comment:

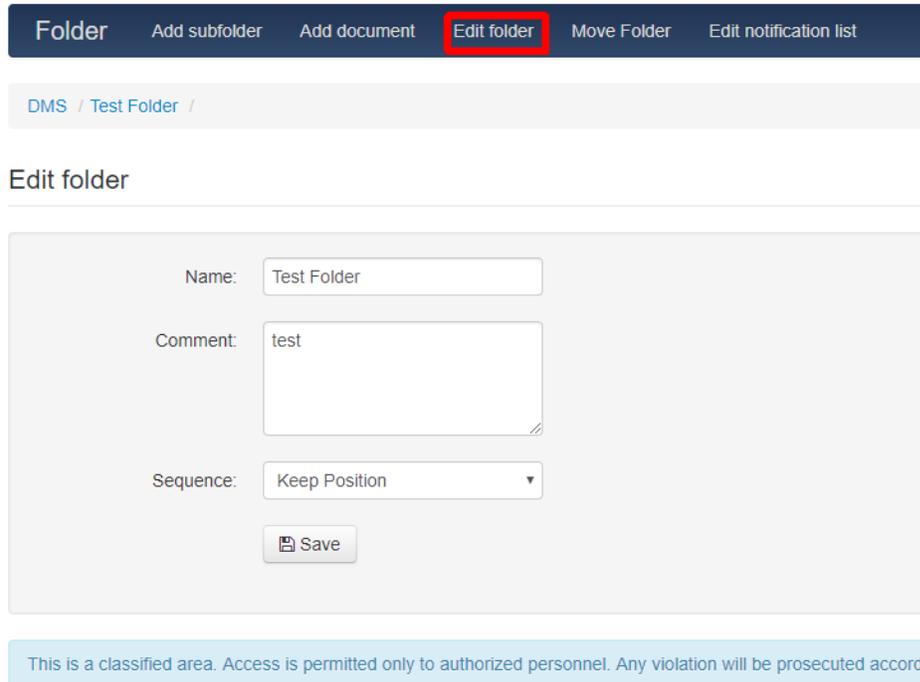
Sequence:

This is a classified area. Access is permitted only to authorized personnel. Any violation will be prosecuted according to the nation's laws.

Figure 5: Adding a subfolder

## How to edit a folder

1. On the left list of folders, click on the folder you want to edit.
2. Click on **Edit folder** in the blue bar at the top of the screen (see below).
3. Edit the folder information and click save.



Folder Add subfolder Add document **Edit folder** Move Folder Edit notification list

DMS / Test Folder /

### Edit folder

Name:

Comment:

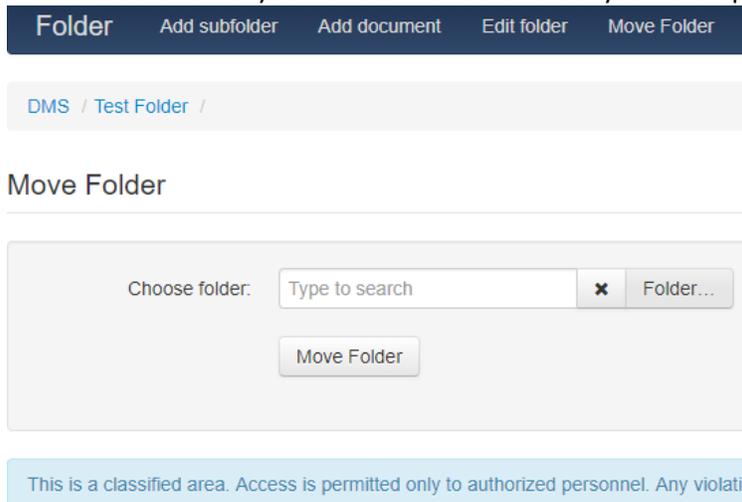
Sequence:

This is a classified area. Access is permitted only to authorized personnel. Any violation will be prosecuted according to applicable laws.

Figure 6: Editing a folder name

## How to move a folder

1. On the left list of folders, click on the folder you want to move.
2. Click on **Move folder** in the blue bar at the top of the screen (see below).
3. Select the folder you want to move the folder you have open to.



Folder Add subfolder Add document Edit folder **Move Folder**

DMS / Test Folder /

### Move Folder

Choose folder:

This is a classified area. Access is permitted only to authorized personnel. Any violation will be prosecuted according to applicable laws.

Figure 7: Moving a folder

## How to get or send notifications of folder updates

1. On the left list of folders, click on the folder you want to get notifications.
2. Click on **Edit notification list** in the blue bar at the top of the screen (see below).
3. Under User select an individual you would like to add. Click add.
4. Once you add a user you will see the option to delete that user from the list (see below).
5. Group distribution is an option to add a whole group to the notifications. We will set up the subteams here so that you can select a whole team to receive notification of changes. The team leader will be in charge of adding and deleting people to the group.

Folder Add subfolder Add document Edit folder Move Folder Remove folder Edit access **Edit notification list**

DMS / Test Folder /

### Edit notification list

Christiana Briddell ✕ Delete **Users added will show here and can be deleted here.**

User:

Group:

This is a classified area. Access is permitted only to authorized personnel. Any violation will be prosecuted according to the national and intern...

*Figure 8: Adding users to be notified of folder changes.*

## How to open a folder.

1. To open a folder click on its name. When a folder is open, you will see:
  - **Folder Information**
    - **Owner:** Who created the folder
    - **Created:** Date the folder was created
  - **Folder Contents**
    - **Name:** List of Folders and documents within the folder you are in. Under each document or folder, the following info is provided: owner, date created, date last version is created, and any note added to that document when it was uploaded.
    - **Created:** Date the folder or document was created. Dates are formatted YYYY/MM/DD and time is Eastern Standard Time. If there is a version of the file, the last version's date of creation will also be listed.
    - **Status:**
      - If the item is a folder it will list the number of documents and/or subfolders with in it.

- Released: Indicates the document is available for editing.
- Lock symbol: Indicates the document is locked for editing.
- **Action:**
  - **Delete (X):** The delete icon is disabled unless you are an administrator.
  - **Edit (pen and paper):** Click to edit the folder.
  - **Lock (closed padlock):** Click to lock the document for editing. *Note: See versioning section.*
  - **Unlock (open padlock):** Click to unlock the document and release it for editing.

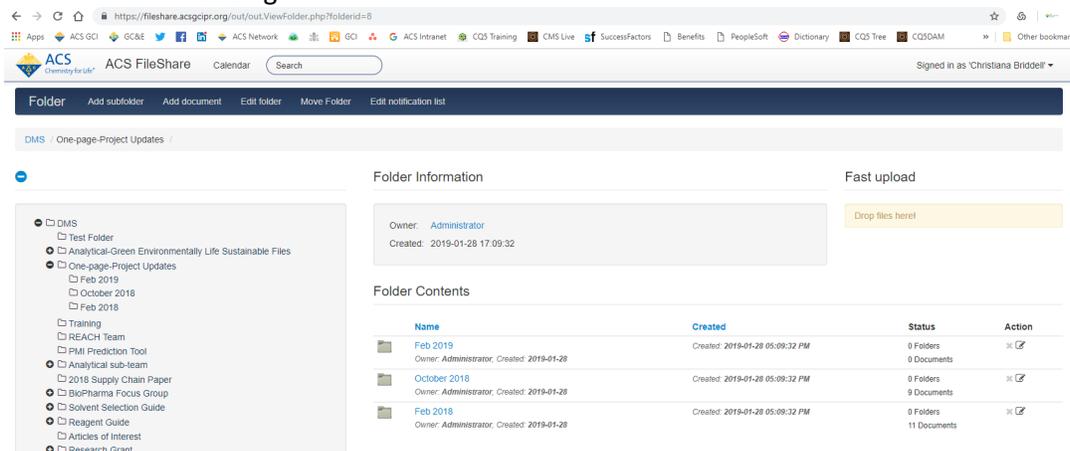


Figure 9: Shows screen options when you have a folder open.

#### Folder Contents

Name	Created	Status	Action
 <b>test document</b> <small>Owner: Administrator, Created: 2019-01-09, Version 1 - 2019-01-09</small> test	Created: 2019-01-09 06:56:48 PM Version 1 - 2019-01-09 06:56:48 PM	 Released	 

Figure 10: Shows a document that is locked for editing.

## How to add a document

There are at least two ways to add a document.

1. First click on the folder you want to add the document in.
2. **Option 1:**
  1. Drag the document from your desktop to into the **Fast upload** area on the top right of your screen.
    - A successful file upload looks like this:

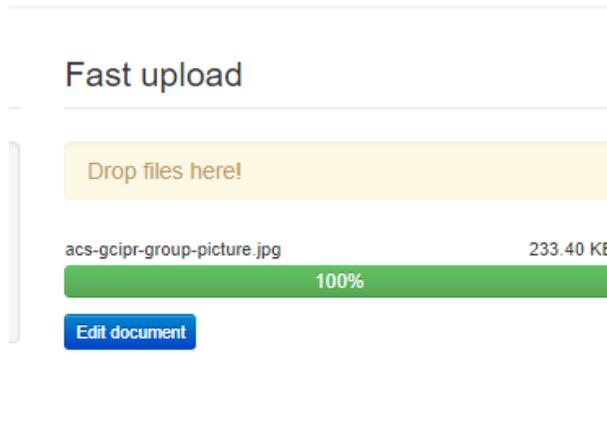


Figure 11: Successful file upload in Fast upload area

- Click **Edit document** button.
  - Enter (optional):
    - **Comment:** This comment should describe the document and will not be editable.
    - **Keywords:** Descriptive key words can help with search
    - **Categories:** Will be set up; also can help with search
    - **Preset expiration:** If a document “expires” its status will change to obsolete. It will not be deleted automatically from the site.
    - **Expires:** By date. If a document “expires” its status will change to obsolete. It will not be deleted automatically from the site.
    - **Sequence:** You can select where this should show up, but not that the default view is by newest first. Users can sort by name or date created, so this selection may not be necessary.
  - Click save
2. **Option 2:** Click on **Add document** in the blue bar at the top of the screen.
- Enter document information:
    - **Name:** Name of document
    - **Comment:** This comment should describe the document and will not be editable.
    - **Keywords:** Descriptive key words can help with search
    - **Categories:** Will be set up; also can help with search
    - **Sequence:** You can select where this should show up, but not that the default view is by newest first. Users can sort by name or date created, so this selection may not be necessary.
    - **Preset expiration:** If a document “expires” its status will change to obsolete. It will not be deleted automatically from the site.
    - **Expires:** By date. If a document “expires” its status will change to obsolete. It will not be deleted automatically from the site.
    - **Owner:** You are the default.
  - Enter version information:
    - **Version:** Defaults to version 1
    - **Local file:** Select your file to upload (must be <100MB)
    - **File from drop folder:** Do not use this.

- **Version comment:** Adds a second comment that will show up on the document details page under current version. Or you can select the box underneath to use the descriptive comment entered in the document information section.
- **Workflow:** No workflows have been set up.
- Assign notification
  - i. **Individuals:** You can notify individuals of the new document by selecting them here. The list is ordered alphabetically by first name, typing in the box will filter the list as it does in a search engine.
  - ii. **Groups:** You can notify groups in the same way here. Groups will be added soon.
- Add document.

### How to edit a document and manage versions.

1. To open a document, click on the name of the document. Once open, you will see:
  - a. **Document Information:**
    - **Name:** Name of the document
    - **Owner:** Name of the person who uploaded the document
    - **Used disk space:** Size of the document
    - **Created:** Date the document was uploaded (YYYY-MM-DD HH:MM:SS)
  - b. **Current version:**
    - **File:** Name, version number, size, type of document (e.g., pdf), name of person who uploaded the version (clickable link; clicking will open an email to them), date and time uploaded.
    - **Comment:** If a comment was included when the document was uploaded it will appear here.
    - **Status:**
      - **Released:** Indicates the document is available for editing.
      - **Lock symbol:** Indicates the document is locked for editing.
    - **Actions:**
      - **Download (downward pointing arrow):** Click to download file to your computer.
      - **View online (star):** This action will only show for PDFs and pictures, simple text files (txt) and saved webpages (html). Click to view document in your browser. Note: Enable pop ups for this site, as this will open a new tab in your browser.
      - **Edit comment:** Opens a field where you can edit the comment attached to the file here. This does not edit the documents description. Click save after changes are made.

ACS FileShare ACS FileShare Calendar Search Signed in as 'Christiana Briddell'

Document Update document Lock Edit document Move document Edit notification list

DMS / Test Folder / Buchwald-Hartwig Reagent Guide hfs and BD and AN edits.pdf

Document Information

Current version Previous versions Attachments Related Documents

Name:	Buchwald-Hartwig Reagent Guide hfs and BD and AN edits.pdf
Owner:	<a href="#">Rich Yates</a>
Used disk space:	5.1 MiB
Created:	2019-01-29 16:18:55

File	Comment	Status	
 SNA: Reagent Guide march 13 hfs edit WITH COMMENTS.pdf Version: 3 3.56 MiB, application/pdf Uploaded by <a href="#">Rich Yates</a> 2019-01-29 16:20:41		Released	<a href="#">Download</a> <a href="#">View online</a> <a href="#">Edit comment</a>

This is a classified area. Access is permitted only to authorized personnel. Any violation will be prosecuted according to the national and international laws.

Figure 12: Shows information and actions at the document level for the current version of a file.

### c. Previous Versions:

- **File:** Name, version number, size, type of document (e.g., pdf), name of person who uploaded the version (clickable link; clicking will open an email to them), date and time uploaded.
- **Comment:** If a comment was included when the document was uploaded it will appear here.
- **Status:**
  - *Released:* Indicates the document is available for editing.
  - *Lock symbol:* Indicates the document is locked for editing.
  - *Obsolete:* Indicates a document has been marked obsolete.
- **Actions:**
  - *Download (downward pointing arrow):* Click to download file to your computer.
  - *View online (star):* This action will only show for PDFs and pictures, simple text files (txt) and saved webpages (html). Click to view document in your browser. Note: Enable pop ups for this site, as this will open a new tab in your browser.
  - *Edit comment:* Opens a field where you can edit the comment attached to the file here. This does not edit the documents description. Click save after changes are made.
  - *Details:* Opens details of previous version
  - *Set Workflow:* We are currently not using this action.

The screenshot shows the ACS FileShare interface. At the top, there is a navigation bar with the ACS logo, 'ACS FileShare', a calendar icon, a search box, and a user profile 'Signed in as Christiana Briddell'. Below this is a dark blue action bar with 'Document', 'Update document', 'Lock', 'Edit document', 'Move document', and 'Edit notification list'. The breadcrumb trail reads 'DMS / Test Folder / Buchwald-Hartwig Reagent Guide hfs and BD and AN edits.pdf'. The main content area is titled 'Document Information' and has tabs for 'Current version', 'Previous versions', 'Attachments', and 'Related Documents'. On the left, a box contains document metadata: Name: Buchwald-Hartwig Reagent Guide hfs and BD and AN edits.pdf, Owner: Rich Yates, Used disk space: 5.1 MiB, Created: 2019-01-29 16:18:55. On the right, a table lists previous versions:

File	Comment	Status	Actions
Reagent guide Chlorination Chris-Tony BD v3-EDITED.pptx	Version: 2 613.77 KiB, application/vnd.openxmlformats-officedocument.presentationml.presentation Uploaded by Rich Yates 2019-01-29 16:19:52	Released	Download, Edit comment, Details
Buchwald-Hartwig Reagent Guide hfs and BD and AN edits.pdf	Version: 1 761.3 KiB, application/pdf Uploaded by Rich Yates 2019-01-29 16:18:55	Released	Download, View online, Edit comment, Details

At the bottom, a blue banner states: 'This is a classified area. Access is permitted only to authorized personnel. Any violation will be prosecuted according to the national and international laws.'

Figure 13: Shows information and actions for a document's previous versions.

**d. Attachments:**

- You can upload and attach a file to another file.

**e. Related Documents:**

- You can link to another document here by selecting it's location and clicking save. This might be useful to reference a file relevant to the current one.

The screenshot shows the ACS FileShare interface. At the top, there is a navigation bar with the ACS logo, 'ACS FileShare', a calendar icon, a search box, and a user profile 'Signed in as Christiana Briddell'. Below this is a dark blue action bar with 'Document', 'Update document', 'Lock', 'Edit document', 'Move document', and 'Edit notification list'. The breadcrumb trail reads 'DMS / Test Folder / Buchwald-Hartwig Reagent Guide hfs and BD and AN edits.pdf'. The main content area is titled 'Document Information' and has tabs for 'Current version', 'Previous versions', 'Attachments', and 'Related Documents (1/0)'. On the left, a box contains document metadata: Name: Buchwald-Hartwig Reagent Guide hfs and BD and AN edits.pdf, Owner: Rich Yates, Used disk space: 5.1 MiB, Created: 2019-01-29 16:18:55. On the right, a table lists related documents:

Name	Status	Action
test document Owner: Administrator, Created: 2019-01-09, Version 1 - 2019-01-09	Created: 2019-01-09 06:56:48 PM Version 1 - 2019-01-09 06:56:48 PM Released	0/1 Related Documents Linked by Christiana Briddell Public: Yes Delete

Below the table is a form to add a link:

Add link:

Public:

At the bottom, a blue banner states: 'This is a classified area. Access is permitted only to authorized personnel. Any violation will be prosecuted according to the national and international laws.'

Figure 14: Shows a document that has been linked to another document.

## Creating a Version

1. Download the current version of the document you want to edit. All edits happen on your computer and not online.
2. After you download the document you can lock it in the DMS so no one else can edit at the same time. The lock is set to expire after 3 hours. Other users will be able to see who locked it and for when it is due to be released (see below).

Document   Update document   Lock   Edit document   Move document   Expires   Remove document   Edit Access   Edit notification list

DMS / Test Folder / acs-gcivr-group-picture.jpg

This document is locked by Administrator. Only authorized users can unlock this document. The lock will expire in 3 hours from 10:47:02 AM EST on 2019-02-21.

### Document Information

Document Lock Expiration Time (hours): 3

ID: 1035  
 Name: acs-gcivr-group-picture.jpg  
 Owner: [Christiana Briddell](#)  
 Default Access Mode: Read-Write permissions  
 Access mode: inherited  
 Read-Write permissions: Administrator  
 Used disk space: 233.4 KiB

Current version   **Attachments**   Related Documents

**File**



acs-gcivr-group-picture.jpg  
 Version: 1  
 233.4 KiB, image/jpeg  
 Uploaded by [Christiana Briddell](#)  
 2019-02-19 07:57:51 pm

Figure 15: Shows alert you will see when a document is locked on the document details page.

3. Once you are done editing it offline, you can upload the document.
4. Click on the document you have created a new version of.
5. Click on **Update document** in the blue bar at the top of the page (see figure below).
6. Upload the file from your computer using **Choose file...**
7. Add optional information.
8. Click update document. This will create a new version of your document.

Document   **Update document**   Lock   Edit document   Move document   Expires   Remove document   Edit Access   Edit notification list

DMS / Test Folder / acs-gcivr-group-picture.jpg

### Update document

Local file:  Browse...

File from drop folder:  x Choose file...

Comment:

Preset expiration: Does not expire ▼

Expires:  📅

Workflow: Select workflow

N.B. Documents are automatically marked as released if no workflow is assigned.

Update document

Figure 16: Shows Update document panel

## How to edit a documents information

1. Note: To edit a document's content you have to download the file and edit it offline.
2. You can edit the documents name and comment by clicking the Edit document button in the top blue bar.

The screenshot shows the ACS FileShare interface. At the top, there is a navigation bar with the ACS logo and the text 'ACS FileShare'. Below this is a dark blue bar with several action buttons: 'Document', 'Update document', 'Lock', 'Edit document' (highlighted with a red box), 'Move document', 'Expires', 'Remove document', 'Edit Access', and 'Edit notification list'. Below the navigation bar is a breadcrumb trail: 'DMS / Test Folder / acs-gcivr-group-picture.jpg'. The main content area is titled 'Edit document' and contains the following fields:

- Name:
- Comment:
- Keywords:
- Categories:
- Preset expiration:
- Expires:
- Sequence:
- 

Figure 17: Shows Edit document panel.