How to create a login to the new site: <u>www.acsgcipr.org</u>

- 1. Go to <u>www.acsgcipr.org</u>
- 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 <u>https://members.acsgcipr.org/register/</u>

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: <u>https://members.acsgcipr.org/wp-login.php</u>
- 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: <u>https://members.acsgcipr.org/</u> 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 <u>www.acsgcipr.org</u>

- 1. If you have already created a login using the method above, when you go to <u>www.acsgcipr.org</u>, you can use the big green button at the top right that says member login.
- 2. This will take you to the <u>login page</u> 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.

Chemistry for Life* ACS FileShare Calendar Search	<u>)</u>		Signed in as 'Christi	iana Bridde
plder Add subfolder Add document Edit folder Edit notification li	st These commands to the right apply to the folder	you are in.		
This is a breadcrumb navigation.		Drag files to	o the area belov	w to up
S /	The Folder information area provides details	They will u	pload in the fol	der yo
All folders moved from Group Site's File Cabinet	on the folder you have open. Folder Information	have open. Fast uplo	ad	
are on the list below, unless archived.		Drop files h	iere!	
C Test Folder	Owner: Administrator			
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One-page-Project Lindates	Comment: DMS root			
C REACH Team				
C PMI Prediction Tool	Folder Contents If there is content in the folder voi	u have open, it will display belo	w.	
C PMI Prediction Tool	Folder Contents If there is content in the folder you	u have open, it will display belo	w.	
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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.

DMS Test Folder	
Analytical-Green Environmentally Life Sustainable Files	
One-page-Project Updates	
🗅 Feb 2019	
Coctober 2018	
🗅 Feb 2018	
C Training	
C REACH Team	
C PMI Prediction Tool	

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

At the end	•		
Add subfolder			
	At the end	At the end At the distribution of the subfolder	At the end At the distribution of the subfolder

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

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.



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 / Tes	t Folder /			
Nove Fol	der			
	Choose folder:	ype to search		× Folder
		Move Folder		
This is a cla	assified area. Access	is permitted only to	authorized per	sonnel. Any violat

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 I	Folder /						
Edit notific	ation list						
L Christian	na Briddell × Delet	Users add	ed will sh	now here ai	nd can be de	leted here	
	User:	Select one	T				
	Group:	Select one	Ŧ				
		Add					

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

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
 - o 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.

\leftarrow \rightarrow C \triangle (a) https://fileshare.acsgcipr.org/out/out.ViewFolder.php?folde	id=8									\$ G 🏎
👯 Apps 🔶 ACS GCI 🚸 GC&E 🈏 🛃 🛅 🔶 ACS Network 💩 🎄 🛐 G	0 🔥 G	ACS Intranet 🛛 🙊 CQ5 Trainin	g 🔟 CMS Live	f SuccessFactors	Benefits	PeopleSoft	😑 Dictionary	CQ5 Tree	CQ5DAM	» 🛛 🧧 Other bookma
ACS FileShare Calendar Search									Signed in as	'Christiana Briddell' 🕶
Folder Add subfolder Add document Edit folder Move Folder	Edit noti	fication list								
DMS / One-page-Project Updates /										
•	Folde	er Information						Fast upl	oad	
DMS Test Folder DAs Dayltical-Green Environmentally Life Sustainable Files Done page-Project Updates Dree 2019	Ow Cre	ner: Administrator ated: 2019-01-28 17:09:32	2					Drop files	herel	
C October 2018 C Feb 2018 C Training	Folde	Name			Cre	ated			Status	Action
REACH Team PMI Prediction Tool Onalvtical sub-team	-	Feb 2019 Owner: Administrator, Crea	ited: 2019-01-28		Crea	ted: 2019-01-28 05	:09:32 PM		0 Folders 0 Documents	× 8
2018 Supply Chain Paper D BioPharma Focus Group		October 2018 Owner: Administrator, Crea	ited: 2019-01-28		Crea	ted: 2019-01-28 05	:09:32 PM		0 Folders 9 Documents	× B
Disolvent Selection Guide Dia Reagent Guide Dia Reagent Guide Dia Articles of Interest Dia Research Grant		Feb 2018 Owner: Administrator, Crea	ited: 2019-01-28		Crea	ted: 2019-01-28 05	:09:32 PM		0 Folders 11 Documents	×Z

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

Folder Contents								
	Name	Created	Status	Action				
1 and the second	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	× 🕑 🗗				

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

How to add a document

There 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:

Fast upload

Drop files here!	
acs-gcipr-group-picture.jpg	233.40 KB
100%	
Edit document	

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.
- \odot 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	ACS FileShare Calendar Search)			Signed in as 'Christiana Briddell' -			
Document	Document Update document Lock Edit document Move document Edit notification list							
DMS / Test Fo	DMS / Test Folder / Buchwald-Harlwig Reagent Guide hts and BD and AN edits pdf							
Document I	nformation	Current version Previous versions At	tachments Related Documents					
Name:	Buchwald-Hartwig Reagent Guide hfs and BD and AN edits pdf	File	Comment	Status				
Owner:	Rich Yates	SNAr Reagent Guide marc	h 13 hfs edit WITH	Released	 Download View online 			
Used disk space:	5.1 MiB	Version: 3 3.56 MiB, application/pdf			Edit comment			
Created:	2019-01-29 16:18:55	Uploaded by Rich Yates 2019-01-29 16:20:41						
This is a slavel								
THIS IS A CLASSIT	Insis a classined area. Access is permitted only to authorized personnet. 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.

3 / Test Fo	Ider / Buchwald-Hartwig Reagent Guide hts and BD and AN edits.p	off				
ument li	nformation	Current version	Previous versions Attachments	Related Documents		
ime:	Buchwald-Hartwig Reagent Guide hfs and BD and AN		File	Comment	Status	
vner:	eaits.par Rich Vates		Reagent guide Chlorination Chris-Ton	iy BD v3-	Released	Download
ed disk ace:	5.1 MiB		EDITED.pptx Version: 2 813.77 KiB, application/vnd.openxmlfi officedocument presentationmi present	ormats-		Edit commentDetalls
eated:	2019-01-29 16:18:55		Uploaded by Rich Yates 2019-01-29 16:19:52			
		T	Buchwald-Hartwig Reagent Guide hfs and AN edits.pdf	and BD	Released	 ● Download ★ View online
			Version: 1 761.3 KiB, application/pdf Uploaded by Rich Yates 2019-01-29 16:18:55			 Edit comment Details

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.								
Chemistry for Life	e ACS FileShare Calendar Search)	Signed in as 'Christiana Briddell' 🔻					
Document	Document Update document Lock Edit document Move document Edit notification list							
DMS / Test Fold	der / Buchwald-Hartwig Reagent Guide hfs and BD and AN edits.pdf							
Document In	formation	Current version Previous versions Attachments Related Documents (1/0)						
		Name Status Action						
Name:	Buchwald-Hartwig Reagent Guide hfs and BD and AN edits.pdf	test document Created: 2019-01-09 06:56:48 PM 0/1 Related Documents Werson 1 - 2019-01-09 06:55:48 PM Network 1 - 2019-01-09 Version 1 - 2019-01-09 Released	Linked by Christiana Briddell Public: Yes					
Owner:	Rich Yates	test	× Delete					
Used disk space:	5.1 MIB							
Created:	2019-01-29 16:18:55							
		Add link: Type to search Document						
		Public: 🕑						
		图 Save						
This is a classifie	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).



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-gcipr-group-pic	cture.jpg								
Update document										
Loo	cal file:		Brow	se						
File from drop	folder:		×	Choose file						
Con	nment:		ß							
Preset exp	iration: Does not	expire	Y							
E	xpires:						*			
Wo	select wo	rkflow								
N.B. Documents are automatically marked as released if no workflow is assigned.										
	Update d	locument								

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.



Edit document

Name:	acs-gcipr-group-picture.jpg		
Comment:			
Keywords:		Keywords	
Categories:	Click to select category		
0			
Preset expiration:	Does not expire		
r reset expiration.			
Evpiros			
Expires.			
Sequence:	Keep Position 🔹		
	🖺 Save		

Figure 17: Shows Edit document panel.