

## Submitting Documents in the Document Library

### [1] The user will need Document Library Permissions to 'Submit Documents'

- If requesting access in a new Program Office, the user will first have to request 'Search Documents' and have the request approved prior to being able to request role updates to include 'Submit Documents'
- Once a user has access to the desired Program Office, the role update request may contain both 'Submit Documents' and 'Search Documents'.
- If DOEHRs-IH has functionality to capture the data within the document, for example, a Food Inspection Survey, the Document Library module should not be used. The data should be captured in the appropriate module and the file attached directly to the record.

[2] If the document is for a single location, access your location and 'Submit' a document as shown below. Using the Submit Document link under the Location name on the left hand navigation will prepopulate the Country and Location into the Document Submission Detail page.

The screenshot shows the 'Document Submission - Detail' form. The left navigation pane has 'Document Library' expanded, with 'Installation US, SC, Fort Jackson' selected and 'Submit Document' highlighted. The main form fields are as follows:

- Country: United States (NATO member)
- Location: Installation US, SC, Fort Jackson, 45404
- Location Start Date: 1917/01/01
- Location Stop Date:
- File ID: (New)
- Buttons: Save, Cancel
- Document Information (Help icon):
  - Operation Name: Select an Operation Name...
  - Document Type: Child/Youth/School Inspection (DA7848)
  - Classification: For Official Use Only
  - Service: Army
  - Start Date of Data: 2019/08/22
  - End Date of Data: 2019/08/22
  - File: P:\DEHE\ESID\DOEHRs-IH\EH\Sanitation\Garrison Forms\ Browse...
  - File Title: DA7848\_CDC Inspection.pdf
  - File Summary: Facility: Bldg 4581\_Scales\_CDC Rating: Marginal
  - Keywords: (separate keywords with a comma)
  - Data Source:
  - Publish Date:
  - Data entered in a DOEHRs Survey?:

- Operation Name is optional
- Document Type drop down is specific to the IH Program Office.
- If the desired Operation or Document Type is not listed, select 'Other' and enter the value in the text box. A user with the QA Documents role will be able to add the value to the list for future use. The new value will not be available for selection until the QA user adds it to the list.
- Individual files cannot exceed 15MB in size.
- The preferred file format is a searchable PDF. The application will accept documents created using commercial applications approved for use however support staff must be able to view the contents of all submissions. Avoid using compression, encryption and password protection.
- File names should reflect the contents of the file and include enough information to uniquely identify the data file. Avoid using spaces and periods. Instead consider using underscore (\_) or dashes (-) to separate meaningful parts in file names. Avoid other special characters like \$ % ^ & # | :
- Complete the rest of the form with the document information. Additional information about how to complete each field can be found in the '?' Help icon pop up. Save when finished.

[3] If the document is for more than one location, 'Submit' a document as shown below. If the document is not specific to a country or location, leave those fields empty and check the box labeled 'Is not location specific'.

[4] A confirmation email will be sent to the submitter with the entered information. If a similar document is ready for submission, the user can click the 'Add Another Document' button and all of the data fields will be auto populated/copied to a new record with the exception of the File Title and the file itself.

[5] If the user submits a document that already exists in the Document Library of the selected Program Office, the following error message will display. The duplication check does not check items attached in other business areas of DOEHRs-IH.

## Searching for Documents in the Document Library

[1] The user will need Document Library Permissions to 'Search Documents'

[2] Search to find and/or confirm your entry. If looking for a specific document, the File ID is the most efficient way to search the library. Using the Search Document link under the Location name on the left hand navigation will prepopulate the Country and Location into the Search page.

- At least one search criteria must be entered/selected
- The Boolean keyword search items will search the content of the document if the document is searchable as well as the Keywords, File Title and File Summary fields.
- The help icon at the top of the search page will explain in more detail how the text search functions.

[3] The results list will be sorted by Country, Location then File ID but can be resorted by clicking any column header. Any documents that are not specific to a location will also be listed. Click the File ID link to view the data entered or click the View link to view/download the document. Browser settings may impact the behavior of the 'View' link.

File ID	Country	Location	Entire Country	Generic Document	Document Type	Operation Name	File Summary	Document	Start Date of Data	End Date of Data	Service	Status
114927	United States (NATO member)	US, SC, Fort Jackson, 45404	No	No	Child/Youth/School Inspection (DA7848)	N/A	Facility: Bldg 4581_Scales_CDC Rating: Marginal	<a href="#">View</a>	2019/08/22	2019/08/22	Army	Ready for QA

[4] The search criteria can be edited without having to start the search from scratch by selecting the action 'Modify Search Criteria' from the 'Other Actions' dropdown.

Document Library - Search Results

File ID	Country	Location	Entire Country	Generic Document	Document Type	Operation Name	File Summary	Document	S	g				
<a href="#">131215</a>			No	Yes	Other - New Document Type	Other - New Operation	testing the new drop down list additions	<a href="#">View</a>	2021/10/01	2021/10/31	Army	Ready for QA		
<a href="#">131216</a>			No	Yes	Other - test Operation	N/A	Staging data for screenshots in tutorial	<a href="#">View</a>	2021/10/01	2021/10/31	Army	Ready for QA		

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[5] The search results list can be exported to Microsoft Excel by selecting the action from the 'Other Actions' dropdown.

Document Library - Search Results

File ID	Country	Location	Entire Country	Generic Document	Document Type	Operation Name	File Summary	Document	S	g				
<a href="#">131215</a>			No	Yes	Other - New Document Type	Other - New Operation	testing the new drop down list additions	<a href="#">View</a>	2021/10/01	2021/10/31	Army	Ready for QA		
<a href="#">131216</a>			No	Yes	Other - test Operation	N/A	Staging data for screenshots in tutorial	<a href="#">View</a>	2021/10/01	2021/10/31	Army	Ready for QA		

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