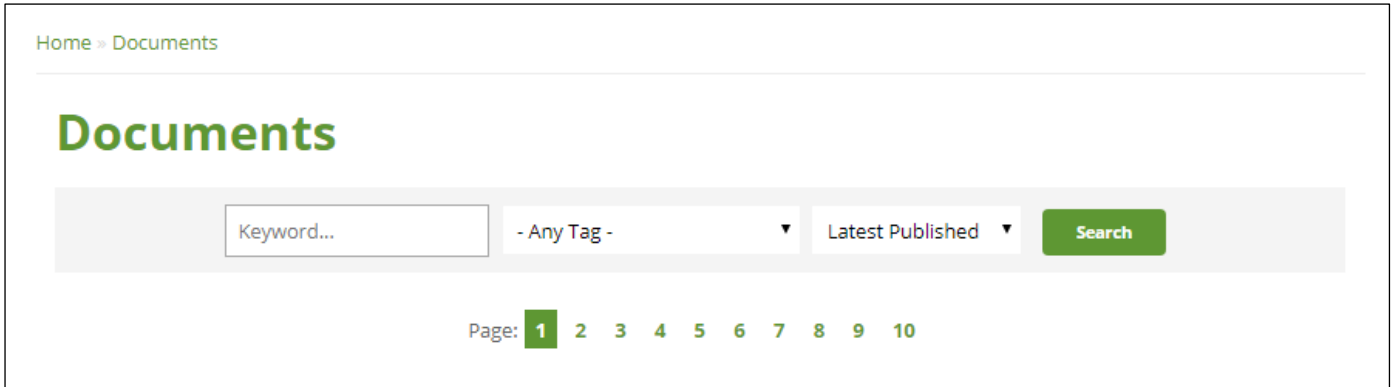


# Document Management System (DMS) User Guide



The screenshot shows the 'Documents' page of the DMS. At the top left, there is a breadcrumb trail: 'Home > Documents'. Below this is a large green heading 'Documents'. Underneath the heading is a search filter bar with three main sections: a text input field labeled 'Keyword...', a dropdown menu currently showing '- Any Tag -', and another dropdown menu currently showing 'Latest Published'. To the right of these is a green 'Search' button. Below the search bar is a pagination control showing 'Page: 1 2 3 4 5 6 7 8 9 10', where the number '1' is highlighted in a green box.

The DMS can be thought of as an online electronic filing cabinet. All documents on the website can be found here. Documents with a 'key' next to them can only be opened when logged in. If you don't have login details then please contact your association and ask them to set an account up for you.

The DMS search filter shown above can be used to quickly find the document(s) you are looking for. Each document will have one or more 'tags' these are used to enable you to view the documents via various categories.

The three fields in the search filter are described below.

## Keyword

A keyword (not case sensitive) can be used to search on the document name, description and tags.

## Tag

The tag field can be set to show all documents that have been tagged with that tag (the number in brackets shows how many documents there are that have that tag).

## Sort By

This field can be used to change the sort order of the search results. Options are:

*Title A-Z* – this will sort on the document titles in alpha numeric order.

*Latest Published* – This will show all documents with the most recently added at the top of the list.

*Oldest Published* – This will show all documents with the oldest document at the top of the list.

## Examples

1) The default view of documents is 'Keyword' = blank, 'Tag' = 'Any Tag' and 'Sort By' = 'Latest Published', this shows all documents with the most recently published documents at the top of the list.

2) To show all legal topic notes in alpha-numeric order. Leave the 'Keyword' = blank, set 'Tag' = 'LTN', 'Sort By' = 'Title A-Z' and click 'Search'.

3) To show all model documents with the word 'Financial' in the document name, description or tag name with the oldest documents at the top of the list. Set 'Keyword' = Financial, 'Tag' = 'Model', 'Sort By' = 'Oldest Published' and click 'Search'.

4) To show all documents that have the word 'Appraisal' in the document name, description or tag name in alpha-numeric order. Set 'Keyword' = 'Appraisal', 'Tag' = 'Any Tag', 'Sort By' = 'Title A-Z' and click Search.