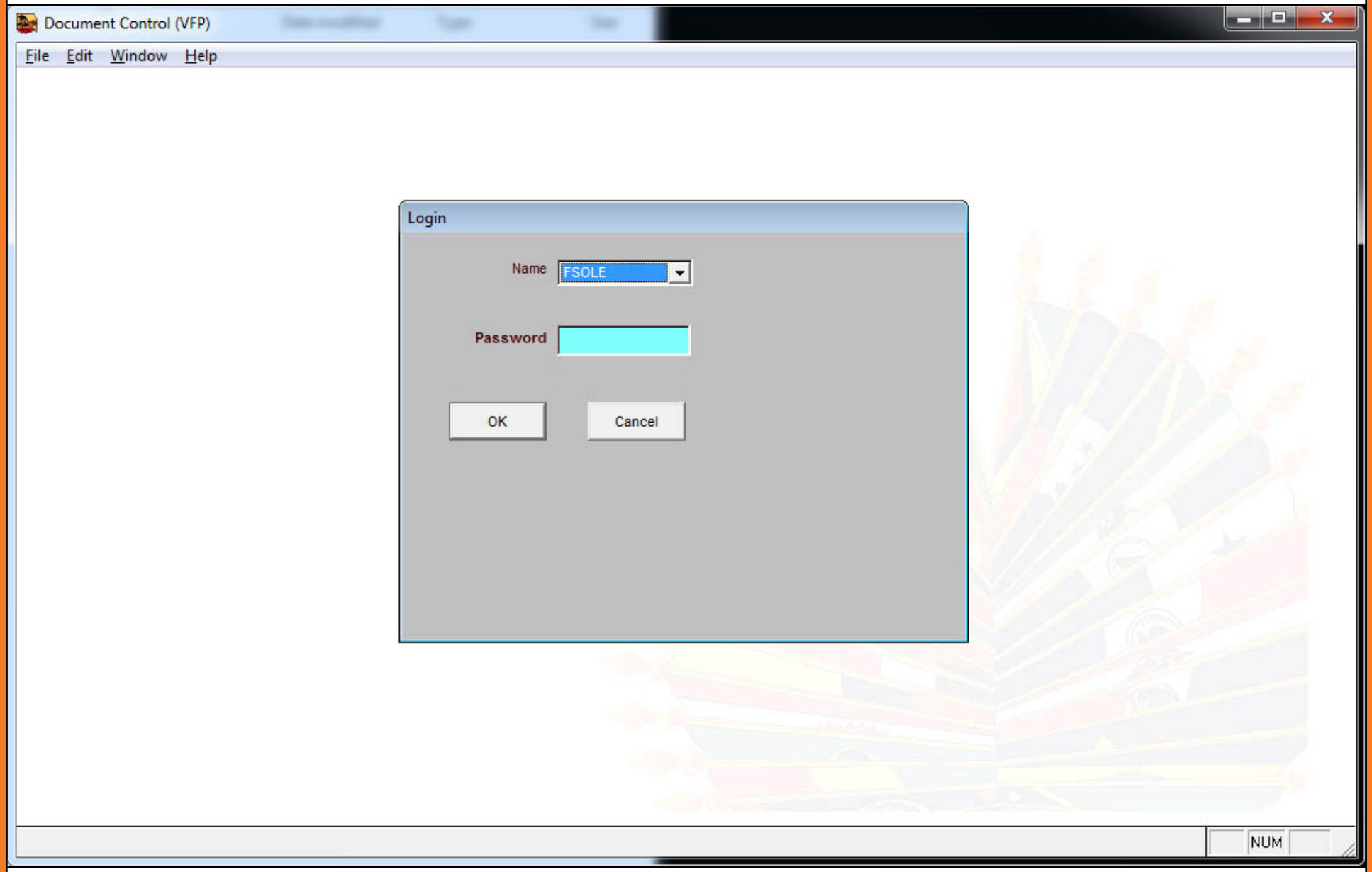
Intelligent Document Management System

IDMS

(English)

Login



Opens straight to user name. No password is needed as only the user who initiated the session on the machine can log in.

Home Screen

Document Control (VFP)

File Edit Document Management Supervisory Functions Navigation Tools Window Reports Help

Pending Records <<PRINT >>

job_number
CP29018P07.doc

CP29018 Information

Microsoft Word

Classification: CP/CAJP
Number: 3021
Rev.:
Corr.:
Add.: 6

Documents Title
SESIÓN ESPECIAL DE LA COMISIÓN DE ASUNTOS JURÍDICOS Y POLÍTICOS (CAJP) SOBRE PERSONAS CON DISCAPACIDAD
Jueves 17 de noviembre de 2011 - 2:30 a 5:30 p.m.
Salón Libertador Simón Bolívar

General Instructions:
DISTRIBUCION GENERAL
Documento de base CP27642

Document Deadline: 07/02/2012 12:00:00 PM
Original Language: Spanish
Owner: A Aristizabal
Created by: RMONROY

Instructions / comments for this action:

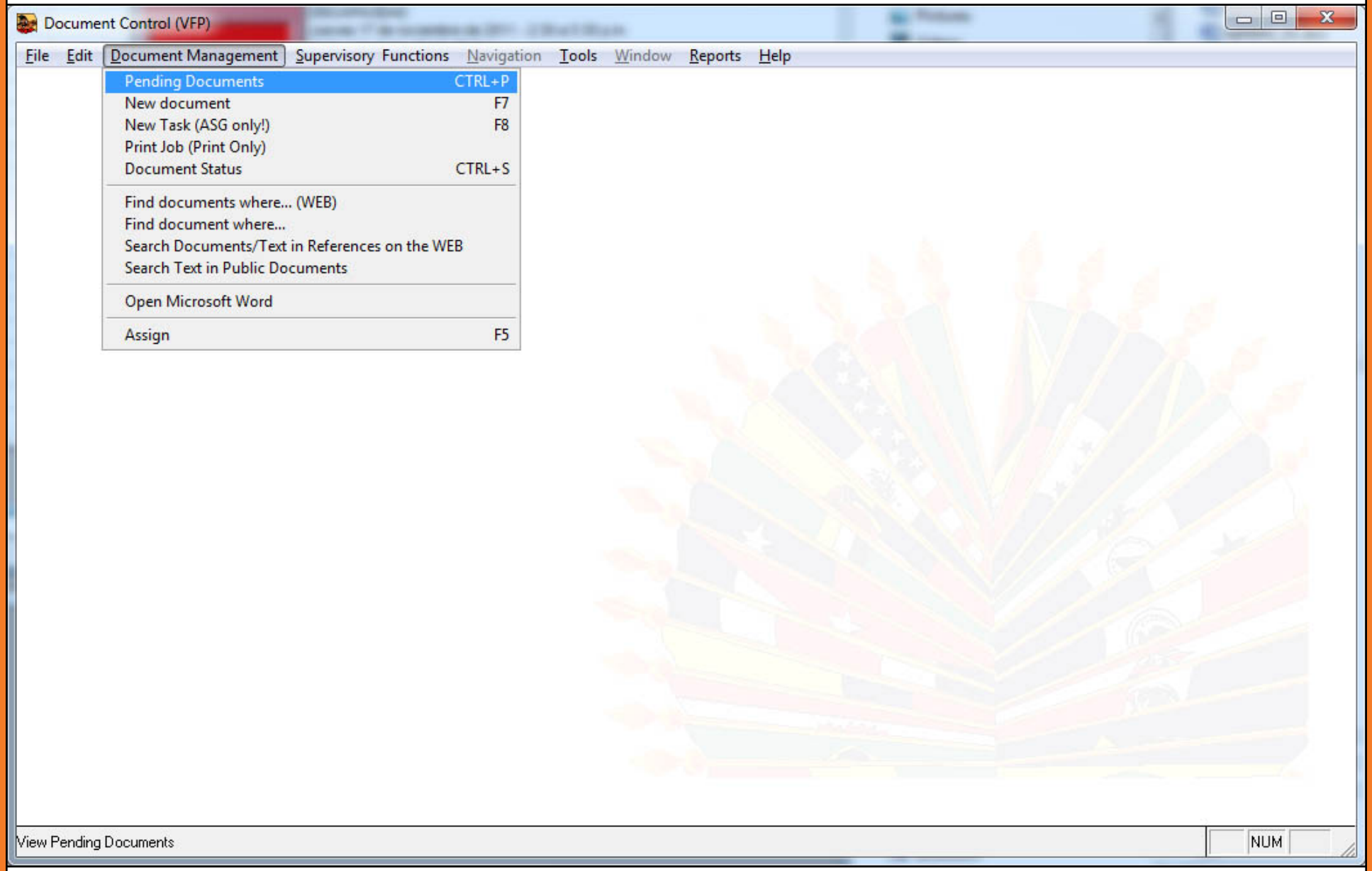
ASSIGN
OTHERS
REJECT
EXIT

14 JOB # From: ASANTOS Date 07/16/2012 05:48:59 PM

Pending Records <<PRINT >> NUM

Opens straight onto "Pending Documents" screen, which is where the list of pending documents for each user can be found. This is explained in detail in the next few pages.

Document Management Menu



This menu contains most of the functions accessible to IDMS users: Pending Documents, New Document, Document Status, Find Documents, Documents Search,* Open Microsoft Word, and Assign.

Document Management Menu: **Pending Documents**

Document Control (VFP)

File Edit Document Management Supervisory Functions Navigation Tools Window Reports Help

Pending Records <<PRINT >>

job_number
CP29018P07.doc

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Instructions / comments for this action:

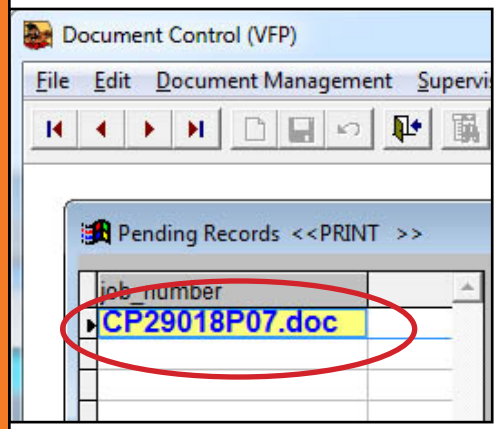
ASSIGN
OTHERS
REJECT
EXIT

14 JOB # From: ASANTOS Date 07/16/2012 05:48:59 PM

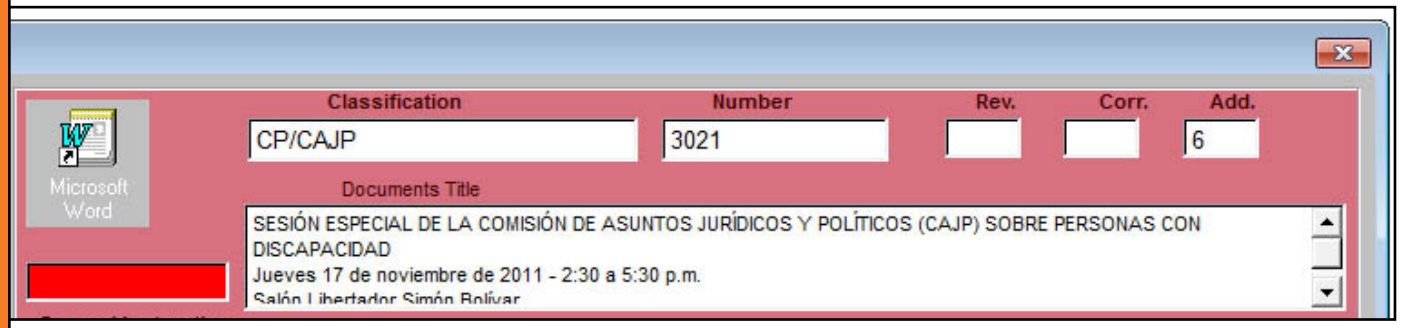
Pending Records <<PRINT >> NUM

Here is where the most important information for the document can be found, such as the job#, classification, title, general instructions, distribution deadline, original language, document user/owner, document user/creator, specific instructions for action, what user sent the document, date and time sent, and buttons for actions: Assign, Reject, Other, and Exit.

Pending Documents Window



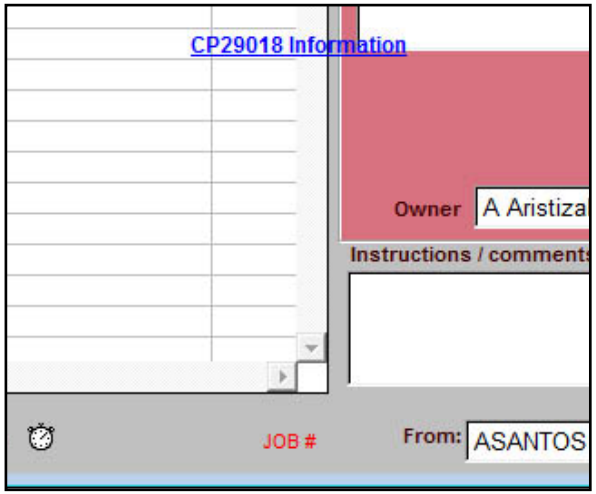
Job#: This is the name assigned to the Word document. It will depend on the type of document created and the area that creates it. The first characters identify the type of document, the next five numbers are generated automatically and refer to the number of actions on this type of document, the letter following is the language and the last numbers indicate the number of steps taken in the action up to that moment. CP29018P07, for example, indicates that it is the 29,018th document of the Permanent Council in Portuguese, and is at IDMS step 7.



Classification: This is assigned by the library and is unique to the types of documents of the meetings.

Number: This is consecutive and assigned by the IDMS to each action created with that classification. The Rev., Corr., and Add. boxes refer to documents with the same classification number but which have been Revised or Corrected, or are Addenda.

Document title: This is the title of the document, the same as what appears on the Word document.



Link information: This link allows us to access all information that was entered when the action was created.

Clock: Updates the Pending window.

Job#: Organizes the documents in the pending window by job#. This also can be done by deadline date or by the order in which they come in.

Pending Documents Window

General Instructions:

DISTRIBUCION GENERAL
Documento de base CP27642

rmation

Document Deadline 07/02/2012 12:00:00 PM

Original Language: Spanish

Owner A Aristizabal

Created by: RMONROY

Instructions / comments for this action:

From: ASANTOS

Date 07/16/2012 05:48:59 PM

ASSIGN
OTHERS
REJECT
EXIT

General Instructions: General instructions that are entered when the document is created. These can be modified by authorized users.

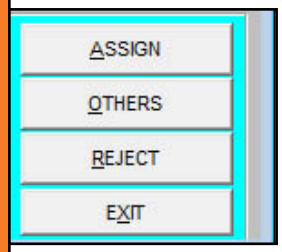
Document Deadline: This is the date by which to distribute the document or to send it to archive. It is entered when the action is created. It can also be changed afterwards.

Original language: Original language of the document created.

Owner: Person to whom the document belongs.

Created by: The person who created the action.

Instruccions / Comments for this action: Refers to Instructions or Comments made for that specific assignment. This comment changes or is erased once another assignment is made.



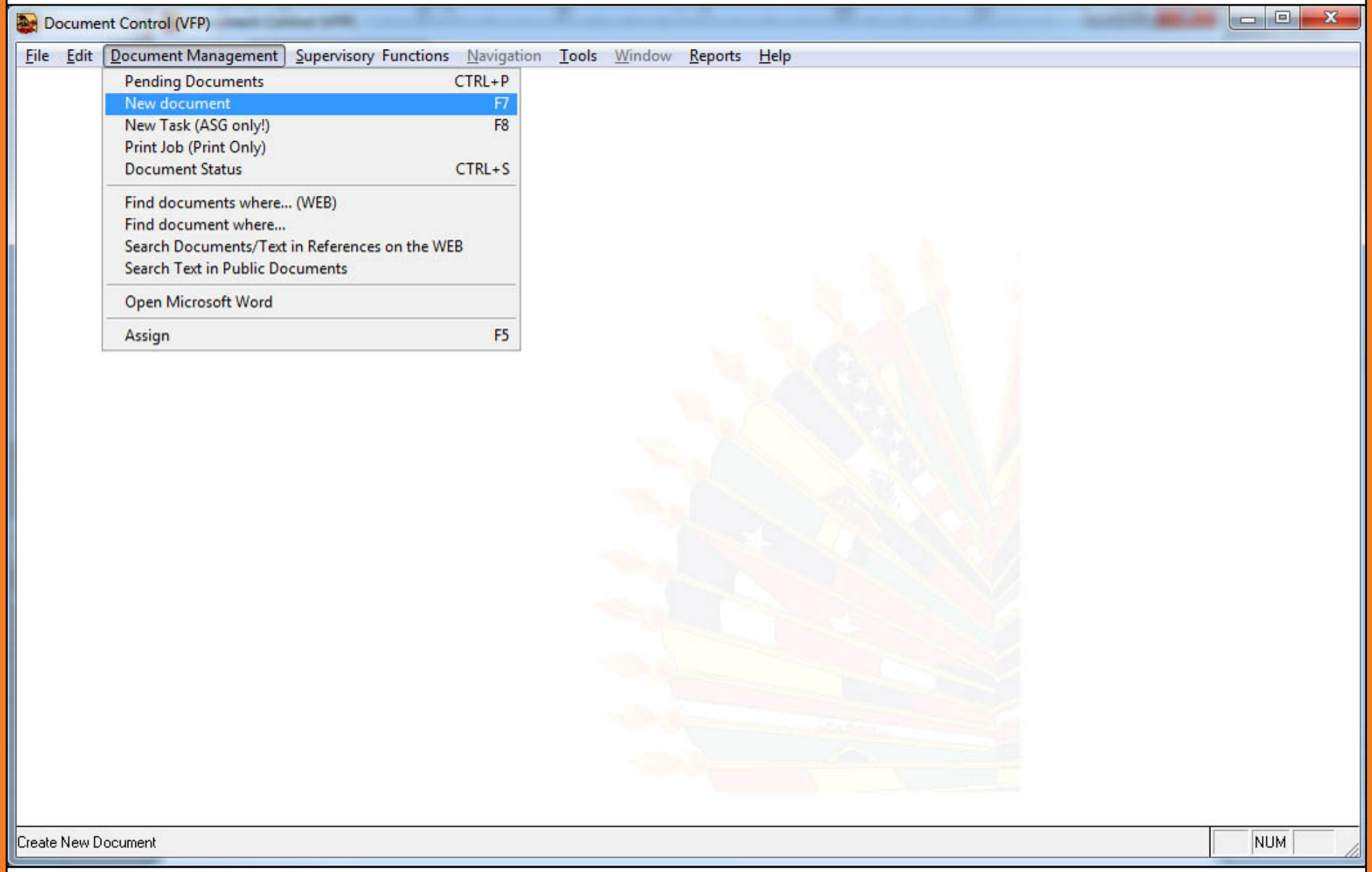
Assign: Assigns the action to another user, to print, or sends it to archive.

Others: This has two options – prints the Routing Slip containing information on the document, or cancels the action.

Reject: Returns the action to the user who sent it.

Exit: Closes the Pending window.

Document Management Menu: **New Document**



This option is used to create documents, be they new or Revised versions, Corrigenda, or Addenda. It can be accessed using the F7 keyboard shortcut. To activate this option on the menu, the Pending window must be closed.

Document Management Menu: **New Document**

Document Control (VFP)

File Edit Document Management Supervisory Functions Navigation Tools Window Reports Help

Creating a new document

Evento: 0 Click HERE to get event number http://oasintranet/oascal

ACCT # 1 *

Type *

Existing Document (Click Here)

c:\temp\templates_empty.doc *

Job # of base document. (leave empty if new)

CANCEL << Previous Next >>

* Mandatory field. Must be entered in order to continue

Evento: This number is assigned by the OASCAL when a room is reserved for a meeting. It is important to know it because this is the number that links the OASCAL, the IDMS, and the CPMS (Document Display System used in the Bolívar Room). It also publishes on the schedule of meetings of the Organization documents related to this meeting. If it is not known and a meeting already has a room assigned in the OASCAL, it can be looked up by clicking on the links beside it, otherwise the number 1 should be entered.

Acct.#: Number of the account to be charged for translations.
Type: Document Type. There are three possibilities: Public, Confidential, and Reference.
Public: Once it is sent to archive, this type of document can be accessed via the Internet.
Confidential: Once this document is sent to archive, it is only accessible through the IDMS and is not published on the Internet.
Reference: These are documents created as reference for other documents.

Existing Document: If the document that is going to be created is already in Word, it can be added here. Otherwise a blank template is generated.

Jbo # of base document: If the intention is to create is a Revised version, a Corrigendum, or an Addendum, this is where the Job # of the base document is entered.

Press {F2} for pick list NUM

Document Management Menu: New Document and Job# Window

Document Control (VFP)

File Edit Document Management Supervisory Functions Navigation Tools Window Reports Help Table

Creating a new document

Evento: 0 Click HERE to get event number http://oasintranet/oascal

ACCT # 1

Type

Existing Document (Click Here)

c:\temp\templates_empty.doc

Job # of base document. (leave empty

CP2906

CANCEL

* Mandatory field. Must be entered in o

Press enter to select...

Key_	Doc_id	A_doctyp	A_docid	Rev	Add_	Corr	Class1	Clas
98067	CP29060	CP	29060				CP/OD-	185
98069	CP29061	CP	29061				CP/doc.	478
98070	CP29062	CP	29062				CP/doc.	478
98078	CP29063	CP	29063	1			CP/doc.	478
98082	CP29064	CP	29064				CP/INF.	646
98083	CP29065	CP	29065				CP/doc.	478
98090	CP29066	CP	29066				CP/doc.	478
98093	CP29067	CP	29067				CP/INF.	646
98096	CP29068	CP	29068	1			CP/OD-	185
98100	CP29069	CP	29069	1			CP/doc.	478

Job # of base document. (leave empty if new)

CP29066 NOTA DE LA MISIÓN PERMANENTE DE NICARAGUA PRESENTANDO, CON EL PATROCIN

CANCEL << Previous Next >>

* Mandatory field. Must be entered in order to continue

V_temp Record: 7/10 Exclusive NUM

After the Job # is entered, F2 is pressed to bring up the document information. It may not take the full job# of the document, in which case F2 is pressed to bring up the list of documents with the characters that let us into the box. Once we find the desired document on the list it is selected and we then press Enter. The Job # along with the title of the document should appear in the window.

Document Management Menu: **New Document**

Document Control (VFP)

File Edit Document Management Supervisory Functions Navigation Tools Window Reports Help

Creating a new document

DOCUMENT

Type: *

Title:

CLASSIFICATION

Reference | Classification code | Number | Other Class | Rev. | Cor. | Add.

Requesting Officer/Area/Phone ext. 6286 *

Document Author/Area/Phone Ext. 6286 *

Original Language *

CANCEL << Previous Next >>

* Mandatory field. Must be entered in order to continue

Requesting Officer: Name and extension of the person creating the action.

Document Author: Name and extension of the person who owns the document.

Original Language: Original language of the document.

Document Type: Here the type of document that is going to be created is selected. Each area is assigned one or more types of documents. Here is where the Job # is assigned the first few characters, such as CP, SEDI, CITEL, AG, etc. Each user has access to the type of documents that the area assigns him or her.

Document Title: Title of the document just as it was or will be entered into the Word document.

Classification Reference, Code: This is part of the document classification that the library assigned to the meeting. The user must have this information on hand when creating the document as it cannot be changed. Once the document is created the classification is kept throughout the process. If the user makes a mistake with the classification, he/she should immediately contact DCMM to remove the action and reset the counters before any further action is generated with that classification.

Rev., Cor., Add.: The user must manually enter these references. If any part of these references needs to be entered, the user must know which part and the corresponding reference number.

Creating a new document NUM

Second window for creation of a document

Document Management Menu: **New Document**

Document Control (VFP)

File Edit Document Management Supervisory Functions Navigation Tools Window Reports Help

Creating a new document

DOCUMENT GENERAL INSTRUCTIONS

PRINT SHOP - IMPRENTA

Type: * # copies: SPAN 0 ENGL 0 FREN 0 PORT 0

Masthead: No Sides: 1

Instructions:

DISTRIBUTION

Instructions:

CANCEL << Previous Next >>

* Mandatory field. Must be entered in order to continue

V_temp Record: 1/1 Exclusive NUM

General Instructions: The instructions are put in this space for those who will receive this action, such as translators or editors.

Print shop - Imprenta: Here the type of electronic distribution desired is selected, the options being: General, Limited, Special, and Do Not Distribute.

Limitada:	Only distribute to Permanent Missions and specific General Secretariat staff members that need to receive the document.
General:	Limiteda + Observer Countries + Secretariat Staff
Especial:	The instructions must specify to whom to distribute. For example, only to the Permanent Missions.
NO distrib:	No distribution.

Third window for creation of a document

Document Management Menu: **New Document**

Document Control (VFP)

File Edit Document Management Supervisory Functions Navigation Tools Window Reports Help

Creating a new document

Event Date 01/01/2037 12:00:00 AM

Document Distribution Deadline 07/26/2012 * (should be at least 3 days before event date)

Originate Actions in... *

The number of words a as the number of words to be translated document is first

July 2012

Today: 7/26/2012

12:00:00 AM

Return day and time

CANCEL

Finished

* Mandatory field. Must be entere

V_temp Record: 1/1 Exclusive

Event date: This is the event date that was put in the first step to create the document. If 1 was put there, the date coming out is 01/01/2037

Distribution Deadline: Fecha en la cual se debe realizar la distribución.

Originate Actions in...: By pressing F2 in this field the Translated Languages windows appears. Here we choose the languages into which we want the document to be translated. The first language that appears on the left is the original language that we selected in step 2.

Translated Languages

Instructions

Select one or more items from the list boxes, then move them to the other list box by clicking on the command buttons. You can also move items between the lists by dragging and dropping the items or double-clicking an item.

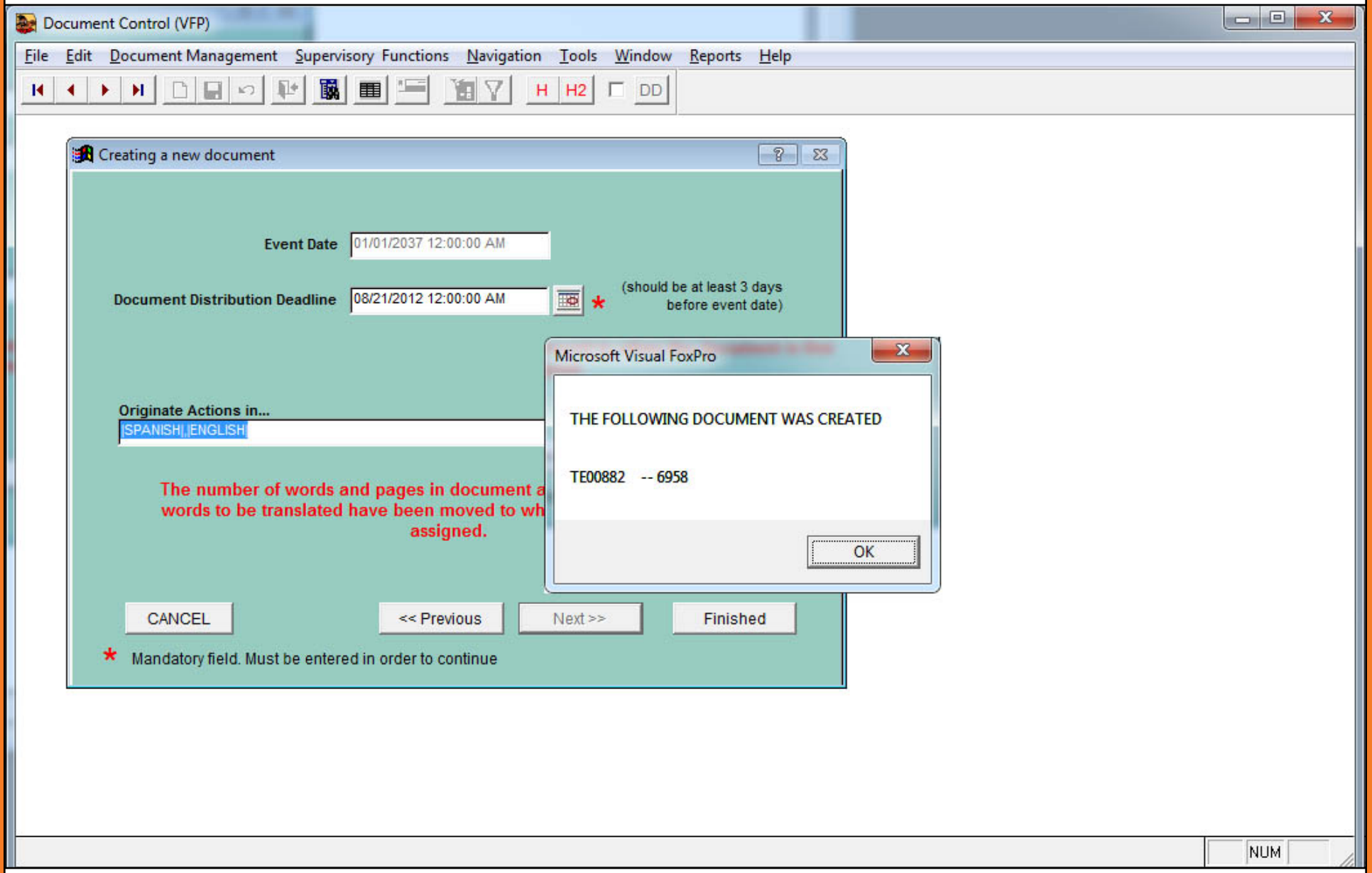
Source List: English, Portugues, French, Bilingue, Textual, _Span/Eng

Selected List: Spanish

Cancel Finished

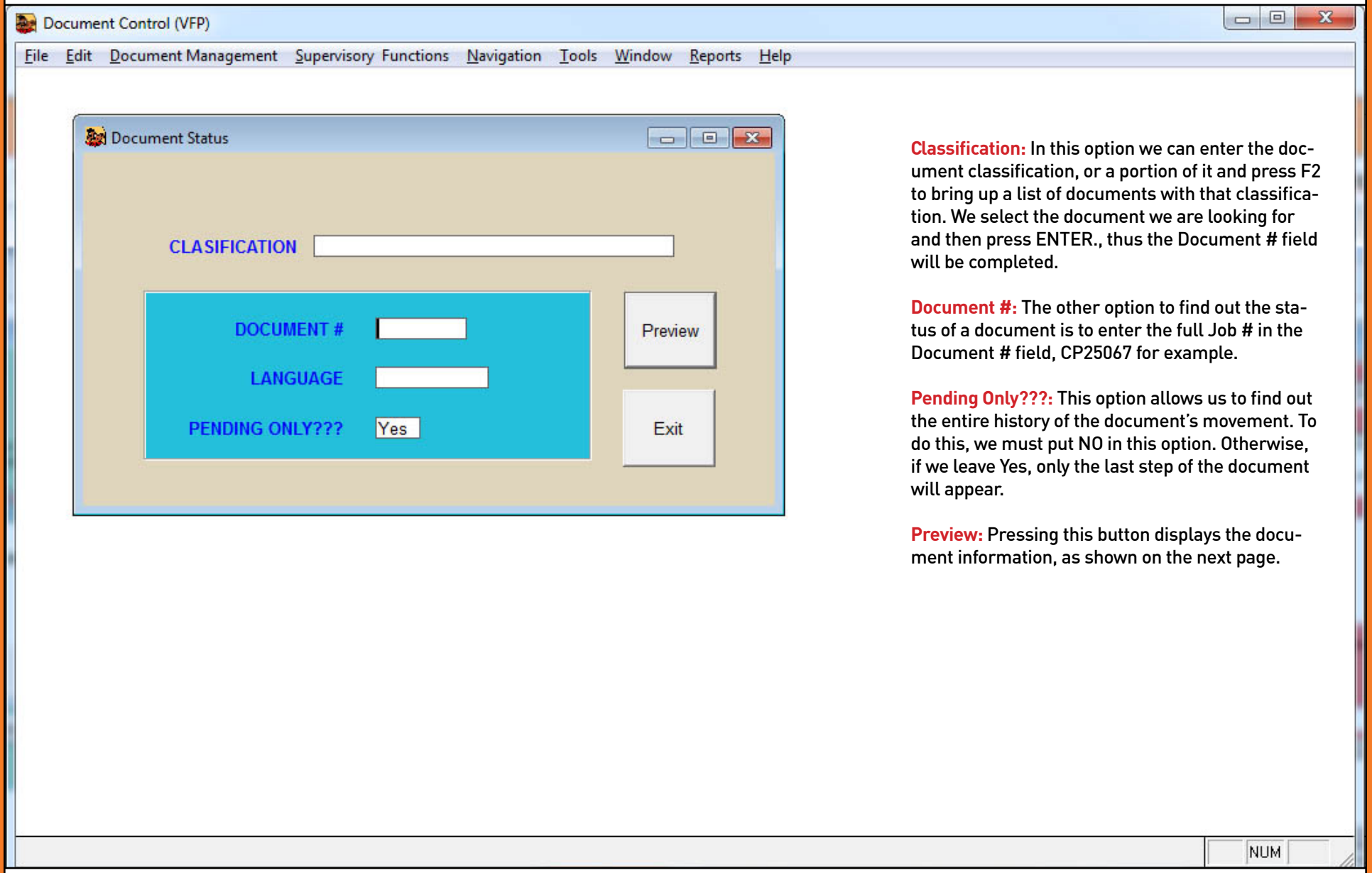
Last page for creation of a document

Document Management Menu: **New Document**



Once the languages are selected, they appear in square brackets in the window. The last step to take is to press the "finished" button and we get a message that the document was created.

Document Management Menu: **Document Status**



Classification: In this option we can enter the document classification, or a portion of it and press F2 to bring up a list of documents with that classification. We select the document we are looking for and then press ENTER., thus the Document # field will be completed.

Document #: The other option to find out the status of a document is to enter the full Job # in the Document # field, CP25067 for example.

Pending Only???: This option allows us to find out the entire history of the document's movement. To do this, we must put NO in this option. Otherwise, if we leave Yes, only the last step of the document will appear.

Preview: Pressing this button displays the document information, as shown on the next page.

Document Status tells us the status of the document within the IDMS. It can also be obtained through the document classification or Document # (Job #).

Document Management Menu: **Document Status**

C:\temp\TEMP.HTM — Confirmation Form

File Edit View Favorites Tools Help

Page Safety Tools

DOCUMENT STATUS FOR CP25067

CLASSIFICATION: CP/INF.6106

TITLE: Convocatoria sesion ordinaria del Consejo Permanente, miercoles 29 de septiembre - 10:30 a.m. Bolivar

Only pending documents in "ARCHIVE","PRINT" or "DISTRIB" are linked

SPANISH

Job Number	From	To	Action	When	Status	Instructions
CP25067S04.doc	DISTRIB	**ARCHIVE**	ARCHIVE	09/28/2010 01:56:49 PM	PENDING	

ENGLISH

Job Number	From	To	Action	When	Status	Instructions
CP25067E09.doc	DISTRIB	**ARCHIVE**	ARCHIVE	09/28/2010 03:47:10 PM	PENDING	

FRENCH

Job Number	From	To	Action	When	Status	Instructions
CP25067F07.doc	DISTRIB	**ARCHIVE**	ARCHIVE	09/28/2010 03:32:17 PM	PENDING	

PORTUGUESE

Job Number	From	To	Action	When	Status	Instructions
CP25067P07.doc	DISTRIB	**ARCHIVE**	ARCHIVE	09/28/2010 03:31:51 PM	PENDING	

Order in actions go from bottom to top

C:\temp\TEMP.HTM — Confirmation Form

File Edit View Favorites Tools Help

Page Safety Tools

DOCUMENT STATUS FOR CP25067

CLASSIFICATION: CP/INF.6106

TITLE: Convocatoria sesion ordinaria del Consejo Permanente, miercoles 29 de septiembre - 10:30 a.m. Bolivar

Only pending documents in "ARCHIVE","PRINT" or "DISTRIB" are linked

SPANISH

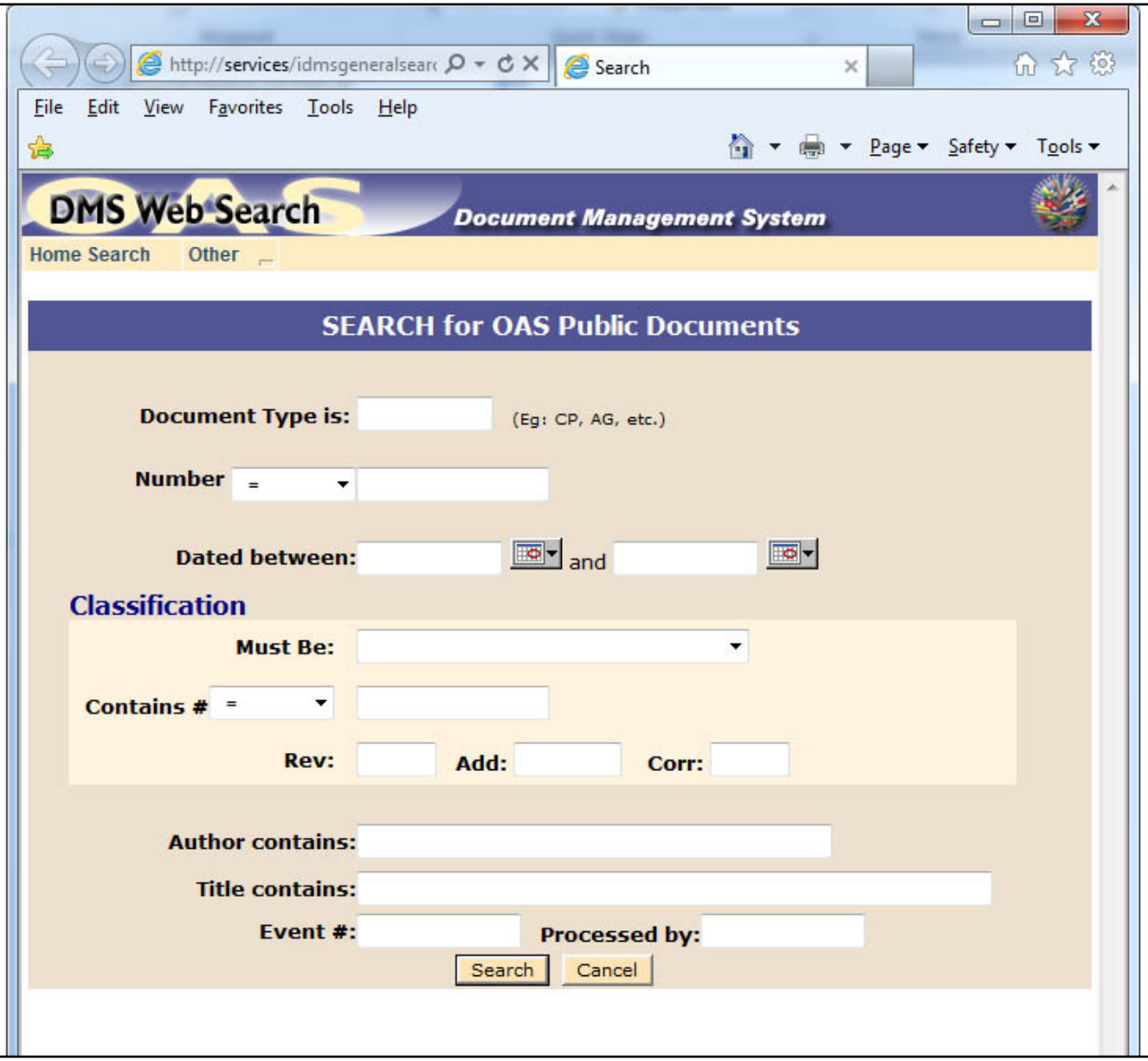
Job Number	From	To	Action	When	Status	Instructions
CP25067S04.doc	DISTRIB	**ARCHIVE**	ARCHIVE	09/28/2010 01:56:49 PM	PENDING	
CP25067S03.doc	PRINT	DISTRIB	DISTRIBUTE	09/28/2010 01:55:07 PM	REASSIGNED	
CP25067S02.doc	JDRAKES	PRINT	PRINT	09/28/2010 01:12:28 PM	REASSIGNED	
CP25067S01.doc	JDRAKES	JDRAKES	CREATED		REASSIGNED	

ENGLISH

Job Number	From	To	Action	When	Status	Instructions
CP25067E09.doc	DISTRIB	**ARCHIVE**	ARCHIVE	09/28/2010 03:47:10 PM	PENDING	
CP25067E08.doc	PRINT	DISTRIB	DISTRIBUTE	09/28/2010 03:44:43 PM	REASSIGNED	
CP25067E07.doc	JDRAKES	PRINT	PRINT	09/28/2010 03:30:04 PM	REASSIGNED	
CP25067E06.doc	ASANTOS	JDRAKES	AS REQUESTED	09/28/2010 03:27:13 PM	REASSIGNED	
CP25067E05.doc	SWALTER	ASANTOS	FINAL EDIT	09/28/2010 03:18:33 PM	REASSIGNED	
CP25067E04.doc	COORD	SWALTER	TRANSLATE	09/28/2010 02:12:44 PM	REASSIGNED	
CP25067E03.doc	IEDWARDS	COORD	REJECTED	09/28/2010 02:11:14 PM	REASSIGNED	
CP25067E02.doc	COORD	IEDWARDS	TRANSLATE	09/28/2010 01:26:14 PM	REASSIGNED	
CP25067E01.doc	JDRAKES	COORD	TO REASSIGN	09/28/2010 01:12:24 PM	REASSIGNED	

Left Screen, document information when the Yes option is put in the *Pending Only* field.
Right screen, document information when the NO option is put in the *Pending Only* field.

Document Management Menu: Find documents where... (Web)



This search engine allows us to access public documents that the IDMS has sent to Archive. The search can be done by Job #, estimated date on which it was created, classification, author name, words in the title, event number, or user who created it. The result is a list of documents based on the search criteria entered.

Document Management Menu: **Find documents where**

Document Control (VFP)

File Edit Document Management Supervisory Functions Navigation Tools Window Reports Help

Find documents where...

Document type is

Dated between And

CLASSIFICATION

MUST be... Contains #

Title CONTAINS:

Name of Owner should INCLUDE...

Document's Original language MUST be:

Run Abort

Press F2 for calendar NUM

This search engine uses some of the criteria that we saw in the previous search engine. What is different is that the search is performed internally in the IDMS and the results it displays are all documents that have the features entered for the search, whether the document is on file or is with some particular user. If the document is with a particular user, only the information for the action that is in the IDMS can be accessed, but not the Word document. When a user has the action, only the user can access the Word document. In some cases, there are user groups that access a particular account jointly and documents are shared on that account, as is the case with CIM, CITEL, CICTE ...

Internal document search engine, the document information is accessed but not Word archive.

Supervisory Functions menu: **Document Information**

Document Control (VFP)

File Edit Document Management Supervisory Functions Navigation Tools Window Reports Help

Documents

Data Entry | List | Page3 | Page4

Job No. 00003 | Reference | Classification | 0

Evento: | Click HERE to get event number | http://oasintranet/oascal | Type R

Rev. | Cor. | Add.

Requesting Officer/Area/Phone ext. | Creation Date 01/01/1900 12:00:00 AM

Document's title

Distribution Deadline 12/17/1996 12:00:00 AM | Original Lang. Spanish

Doc_id	Lang	Ver_rev	From_	Routed_to	Status	Action	Pri

Create a New Action

Documents NUM

Filters: The filter button must be pressed to enter the document Job No. that is to be modified or to obtain information. Once this is done, the window changes color, turning red and allows us to enter the Job # of the document. Once that Job # is entered, the other filter button is pressed to obtain information on the action.

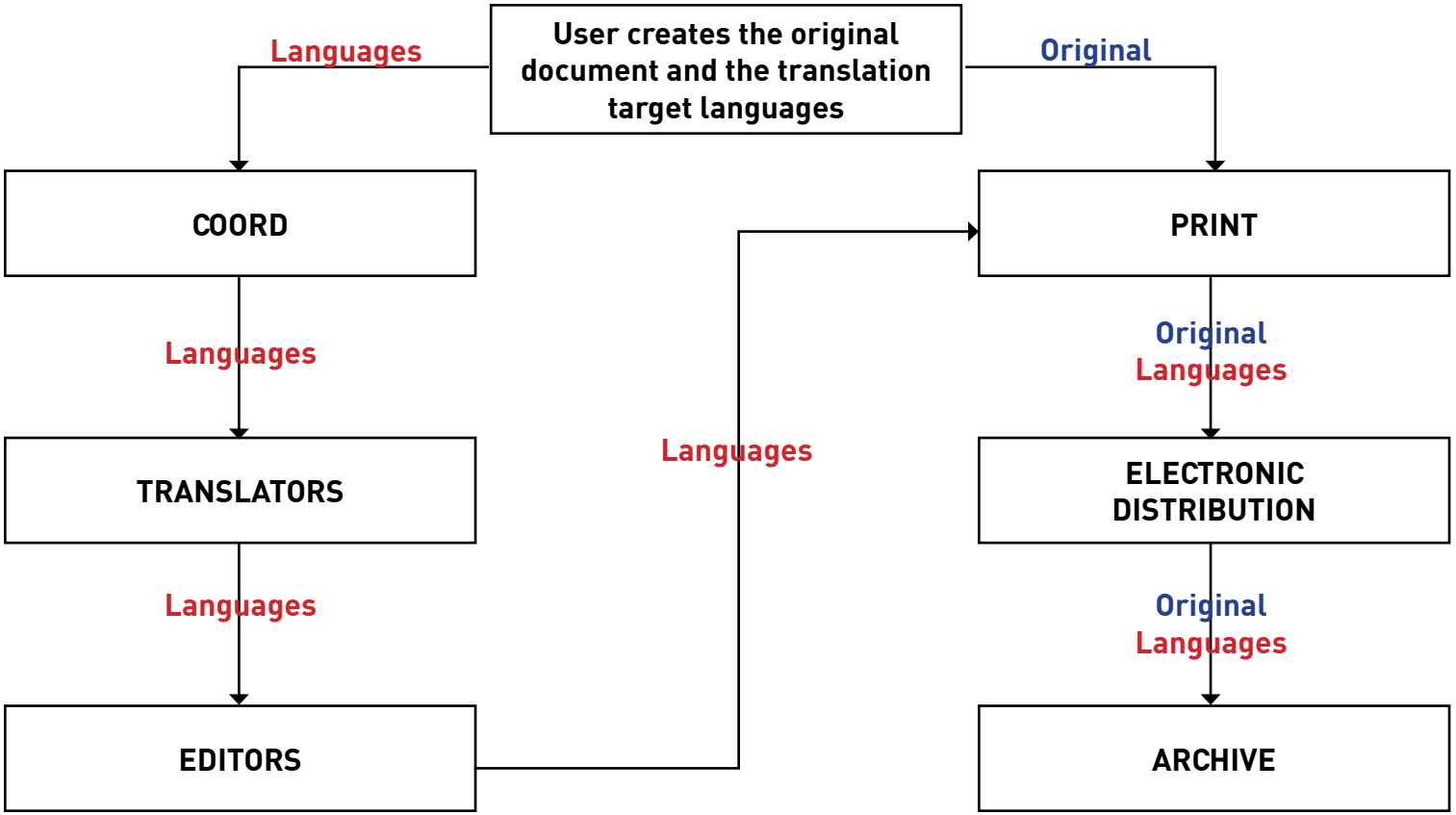
Editable fields: The fields that we can access and modify are: Event, Type, and those in the gray boxes. There are also editable fields in each of the List, Page 3 and Page 4 sub-categories.

Create a New Action: This option allows us to add languages and create an action. Once we get the information from the document to which we want to add one or more languages, as explained in the previous step, click on the "Create a New Action" button and a new window opens, where we enter the language or languages to be created.

The process to add the language or languages to an action is the same as when the document is created. F2 is pressed and the window with the languages opens. It must be borne in mind that the window that opens by pressing F2 displays the original language of the document on the right side, and this has to be deleted and just enter the language or languages to be created. Once created, the language or languages appear directly in the Pending window.

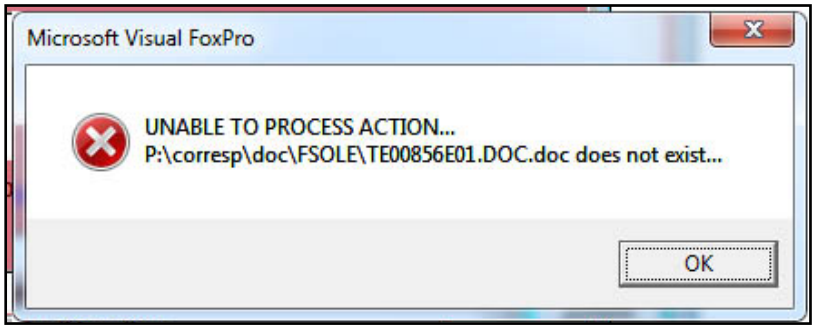
Only authorized users have access to this menu option. Here the information of a particular document is obtained and modified. Languages may also be added to the original action.

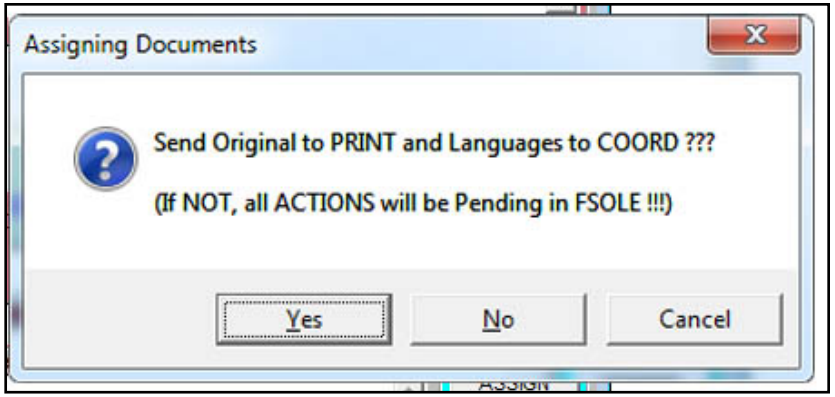
Ideal processing flow



This would be the ideal flow of documents, but it may also vary. The user can request that the translated documents be sent back once the editor has reviewed them, in which case the user is responsible for sending the documents to PRINT or directly to ARCHIVE.

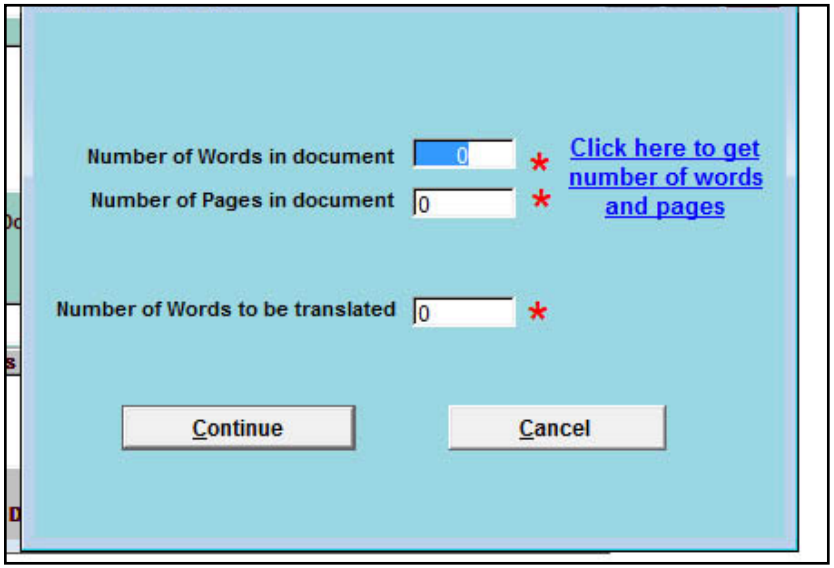
Errors, Warnings, etc...

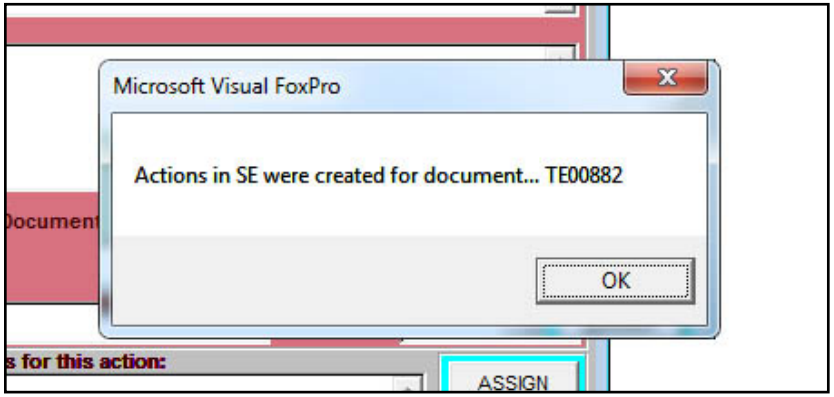




The first window displays a process error. It usually displays this error when we want to Assign or open a document from the Pending Documents window and the Word file is not found in our IDMS folder. This can be solved by going to the user's folder and entering the Word document with the job # exactly as it appears in Pending Documents. The path to the user's folder is: P:\apps\Corresp\doc\username.

The second window appears once the document is created and we want to generate languages into which to translate. In the ideal flow we would answer YES to this question and what it would do is to send the original to PRINT and the languages to COORD. If NO is the answer, it generates the languages in our user and we must then manually send each language to COORD.





These two windows are related to the previous one and they appear once we want to generate languages. What the window above does is to count the words to be translated. The window below is the confirmation that the actions in the languages were created.

Any questions?

For any problem with or question about the IDMS, please contact
Fernando Sole - x0645 - fsole@oas.org or Mauricio Azoulay - x0657 - mazoulay@oas.org