

# **DocFinity Training**

**for Facilities Records Team**

**12/13/2022**

Introductions

We will be recording this.

## Learning outcomes

By the end of this session, you should be able to

- Get familiar with the DocFinity Screens and how to make some changes to how things look
- Find an existing document using DocFinity's interface,
- Refine search results

## Agenda

- Conversion details
- DocFinity user interface (“UI”): Finding documents
  - Hands-on Search Example with Searching Tips
  - Copy and share links to documents
  - Narrowing down Search Results
- Review

# Conversion details

## Converting January 17, 2023

- January 11, 5 PM: old system will be read only
- January 17: new system will be in place and usable
- Old system will continue to exist in a read-only state, with a banner until Mid March

## **Notable Changes**

- Field Names are changing (See appendix)
- ALL documents will receive new DocFinity document IDs and the document IDs are very long, but the old document ID is available for reference and searching
- Documents are shareable via a tool within the system
- Search criteria is entered into separate search prompts, rather than on one line

# DocFinity user interface (“UI”): Finding documents



Web site

<https://edmstest.uw.edu>

- Can everyone log in?

Production site:

<https://edms.uw.edu>

## Workspaces

- You see a “Workspace,” which is composed of “Panels”
- Initial Workspaces:
  - Searching - the default
- You can save your current screen as a workspace
- You can set your preferences to open up views of the documents in a pdf viewer to display multiple documents at once in separate tabs

## DocFinity Panels

- Document Viewer
- Information
- My Desktop
- Results
- Search

## Finding existing documents

1. Use the “Search” panel
  - We have created a Basic Search and an Advanced Search Panel
2. Set search prompts
  - Note if the prompt has the word “is” for an exact match, or “contains” for if it will search for a partial match
  - Advanced Search has “Boolean like” functionality
3. Click “search”
4. See “Results” panel
5. “View Information” button in “Results” to see metadata

## Searching with the “Search” Panel

- Select the search, e.g. “FIL: Facility Records ”
- Select metadata
  - Because of the large amount of data, it is important to add at least the Facility/Facnum you are searching for
  - You can select multiple values
- Additional options, e.g. effective date ranges
- Click “Search”

*Note: A “tree hierarchy” show at the bottom of the search page and change based on searches. To refine by those, use “Filter” instead of “Search”.*

## Example Search

- Search for documents related to the Magnuson Health Sciences Center H-Wing Tower Replacement
- Document is a drawing - as built of the Cooler Replacement Electrical
- Drawing is 7th Floor
- Document is related to Electrical Discipline.
- Document is related to the Chemistry Cooling Tower Replacement.

## Results Panel

- Has tabs for each search you've run
- Has buttons
- Can sort by column
- Can drag search results columns
- Next/prev at bottom

## Document Viewer

- Next/previous in document viewer takes you to the next document
- Expand document & pop out document
- If you selected to display in a pdf viewer, you are able to keep multiple documents open in separate tabs

## Document Search Result

Project: 206430 - HSC H-Wing/EE/Chemistry Cooling Tower Replacement

Facility: 1228 - Magnuson Health Sciences Center H

Discipline: Electrical

Document ID: 00000001g3fkkcvrbx00xtvva9zq4zxq

206430\_H-Wing\_As-Built\_8.18.20\_1\_40.pdf

[https://uw.cloudtest.docfinity.com/docfinity/urlapi/viewer/previewdoc/?p\\_u=U2FsdGVkX1%2B58JFwxzOiylakpgX%2FjUnZe0h2N4r3eoWTcmyUnvibKe%2BvCrzdLX%2BsShZL%2Fgt0EK9HdvwX5N%2BkJQ%3D%3D](https://uw.cloudtest.docfinity.com/docfinity/urlapi/viewer/previewdoc/?p_u=U2FsdGVkX1%2B58JFwxzOiylakpgX%2FjUnZe0h2N4r3eoWTcmyUnvibKe%2BvCrzdLX%2BsShZL%2Fgt0EK9HdvwX5N%2BkJQ%3D%3D)



## Searching Tips and Narrowing Down Search Results

- See the searching tips in the Appendix for wild card usage and other tips, as well as what size documents can be opened in DocFinity vs. which ones must be downloaded due to their size or file type.
- Set preferences to open search results in a pdf Reader instead of the Document Viewer to open multiple results in new tabs
- View details of documents to see complete set of metadata
- Double-click to open up a selected document and make sure it is opened and not displaying the information from the previous document
- The more search prompts are added, the more refined the search will be
- Click on a result in the tree hierarchy to filter results

## File Size Limitations

- 30MB inline display limit; larger files will prompt the user to download the document for viewing and no preview is available.
- Note: 99% of the files in the DMS are 30MB and smaller. In our testing, 2GB files can take anywhere from 2.5-5 minutes to download, depending on a range of factors.
- The current configuration is for a maximum 2GB file. This limit can be revised if there is a business need.

## Results Panel Buttons

- View
- View Information
- View Notes
- Download
- Export
- Copy Rows
- Export Results to Spreadsheet
- Refresh
- View Details
- View text
- Copy link

Review

## Learning Outcomes Review

You should now be able to

- Move around the DocFinity Screens and make some changes to how things look,
- Find an existing document using DocFinity's interface,
- Refine search results

## How to Get Help

Customer Support portal for the Document Management System and have following DocFinity related materials available:

- Online training videos [[web.microsoftstream.com](http://web.microsoftstream.com)] (MS Stream site, UW NetID login required)
- [FAQ on the Customer support site.](#)
- DocFinity User Guide [[drive.google.com](http://drive.google.com)], customized for UW
- Submit ticket via UW Connect

Questions?

Basic Search	Advanced Search	Selection Options	Usage
	Document ID is	free form text. Must be exact match	This is the new DocFinity Document ID. The search value must match the ID. This field does not do partial matches.
Facility	Facility	Single <u>select</u> . Facilities are displayed with Facility number followed by the name.	Drop down, single selection of the Facility. The Search Panel says "Facility" but the Information Panel says "Primary Facility"
Disciplines	Disciplines	Architectural Civil Electrical Landscape Mechanical Structural	
Project	Project		Multi-select by clicking on each selection. Project number precedes Project Name
Record Type	Record Type	Document - Approved Submittal Document - Design Document - Hazardous Materials Document - Index Document - Maintenance Manual Document - Report Document - Specification Manual Drawing - As-Built Drawing - AutoCAD Drawing - Linked PDF Drawing - Record Drawing - Redline Drawing - Shop Drawing - To Be Revised Floor Plan Photo - Campus Training Video - Linked PDF	Multi-select by clicking on each selection.
	Document Classification	Public Restricted	Void option has been removed as the department will now <u>have the ability to delete</u> documents.
	Document Title or Description contains	free form text	Field does a search across both the Document Title and Document Description metadata objects for a partial match
Document Title contains	Document Title contains	free form text	Field will search on a partial match within the Document title
Document Description contains	Document Description contains	free form text	Field will search on a partial match within the Document description
Document Year is	Document Year is	free form text. Must be an exact match	
	Wing is	free form text. Must be an exact match	
	Floor is	free form text. Must be an exact match	



Basic Search	Advanced Search	Selection Options	Usage
Sheet Number is	Sheet Number is	free form text. Must be an exact match	
	Paper Size		Drop down <a href="#">Multi-select</a>
	Revision Date From:	Calendar selection	Ability to select within a date range
	Revision Date To:	Calendar selection	
	Original Document Number is	free form text. Must be an exact match	
	Document Source	Contractor list	Drop Down Multi-select
	Link contains	free form text. Accepts partial match	
Original File Name contains	Original File Name contains	File name of document that was uploaded originally	free form text. Accepts partial match
Original File Extension	Original File Extension	Drop down select. Options: dwg <del>htm</del> log pdf <del>png</del> tif txt zip	Replaces "Content type". What type of file it is. For <a href="#">example</a> "pdf"
	WCC Document ID is	free form. Must be an exact match	
	Note contains	free form. Accepts partial match	Utilize <a href="#">DocFinity</a> Notes
	Not in Title or Description	free form text. Accepts partial match	
	Not in Discipline	Drop down single select. Same options as in Discipline	
	Ingest Date from	Select date range for when document was added to the system.	Calendar selection tool
	Ingest Date to		Calendar selection tool
	Indexed Date from	Select date range for when the document had metadata added.	Calendar selection tool
	Indexed Date to		Calendar selection tool

## Searching Tips

- Add the metadata values which correspond to the document(s) you are searching for. Provide as much specific information you have available to you to refine your search. **The more search queries you use, the more refined your results set will be.**
- For **dropdown prompts**, typing a part of the value you are looking for will reduce the list to those selections containing that text.
- **Wildcard searches** (%) support entering part of the search string. For example:
  - 400470% will return all student IDs that begin with 400470.
  - %400470 will return all student IDs that end with 400470.
  - %400470% will return all student IDs that have 400470 anywhere in the field.
- **Boolean operators** (AND, OR) function as follows:
  - Search allows for searching with multiple values. Note that this operates as an “or” when multiple values are selected within a search prompt for finding the results.
  - Search functionality within and across metadata object search prompts works as follows:
    - “and” between the search fields (so must ‘include’)
    - “or” between the multi-select values (so ‘either,’ or ‘both’)
  - Note that the system cannot do a search on a partial ID, *unless* you use a wildcard search (See above). Again, the only wildcard allowed is %.

# Search Configuration

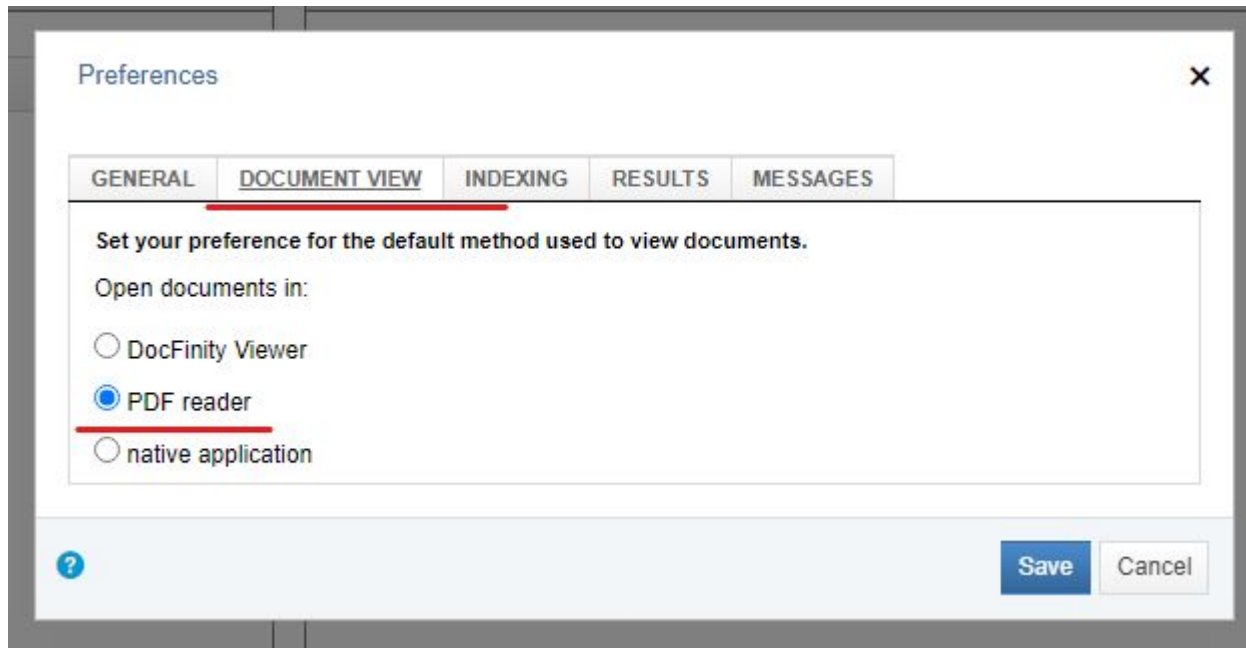
- Search fields are configured in different ways to execute the search using the metadata. This configuration will depend on the types of the metadata objects required by your specific business process. The fields may have the following configurations:
  - Select from a valid set of drop-down values
    - Single value
    - Multi value
  - Exact matches (will say “is”)
  - Partial matches (will say “contains”)
  - Date selection
  - If configured, parent-child relationships to limit to appropriate next set of values
- The order of search prompts can be changed. Furthermore, additional metadata objects, if they already exist, can be added as searchable fields. Please route such requests through your department’s primary DMS contact.
- Metadata naming has been standardized across the implementations, and where a(n) UW convention exists, that is the standard. For example, quarters are “Autumn,” “Winter,” “Spring,” and “Summer.” The Academic year begins in Autumn and ends after the Summer Quarter.
- If the result isn’t found with the initial search prompts, add additional information in Search Prompts to refine the search.

## Search Results and Viewing Documents

- Most columns in the Search Results panel are sortable.
- If one needs to look at multiple documents to “see” if a result is what they want, they should make sure they have configured their preferences to open documents in a pdf reader.



- Select to view documents in the pdf viewer:



## Size Limitations for Viewing Files in DocFinity vs. Downloading to Desktop

What is the file size limit for viewing in DocFinity?

- 30MB inline display limit; larger files will prompt the user to download the document for viewing and no preview is available.
- Note: 99% of the files in the DMS are 30MB and smaller. In our testing, 2GB files can take anywhere from 2.5-5 minutes to download, depending on a range of factors.

What is the file size limit for storing files?

- The current configuration is for a maximum 2GB file. This limit can be revised if there is a business need.

## File Formats Supported Within DocFinity Viewer

Are there specific file types I can't upload?

- No, there are no restrictions. DocFinity supports importing, uploading, storing, retrieving, and flowing *any* digital file format. The following file types can be viewed directly within DocFinity; other formats may need to be downloaded and opened in their native applications to view.

.bmp	.dotx	.pdf	.ppsx	.sxw	.xlsx
.csv	.gif	.pkx	.ppt	.tif	.xltn
.doc	.htm	.png	.pptm	.txt	.xlt
.docm	.html	.potx	.pptx	.xlm	.xltx
.docx	.jpg	.ppam	.ps	.xls	.xltw
.dot	.lam	.pps	.rpt	.xlsb	COLD
.dotm	.odt	.ppsm	.rtf	.xlsm	

**All other files will be downloaded to the desktop to be viewed, with the exception of some TIFF files:**

- DocFinity View supported file types: “Besides PDF, the viewer can display Black and White TIFFs (Low Compression Group 3 and High Compression Group 4), Grayscale TIFFs (LZW and JPEG Compression), and Color TIFFs (LZW and JPEG Compression). “