

Archive system user guide

Table of Contents

- System goals 2
- System navigation 2
 - Archive site navigation 3
 - Archive home page..... 3
 - Archive document library 3
- Archive system main features 4
 - Create folder..... 4
 - Upload files/documents 5
 - Download a copy from a document 6
 - Delete a document 7
 - Document version history 8
 - Document metadata 8
 - Document library views..... 9
 - Search document by document ID 9
 - Search document by its content..... 10
 - Filter document by its metadata and Order document ascending and descending 10

System goals

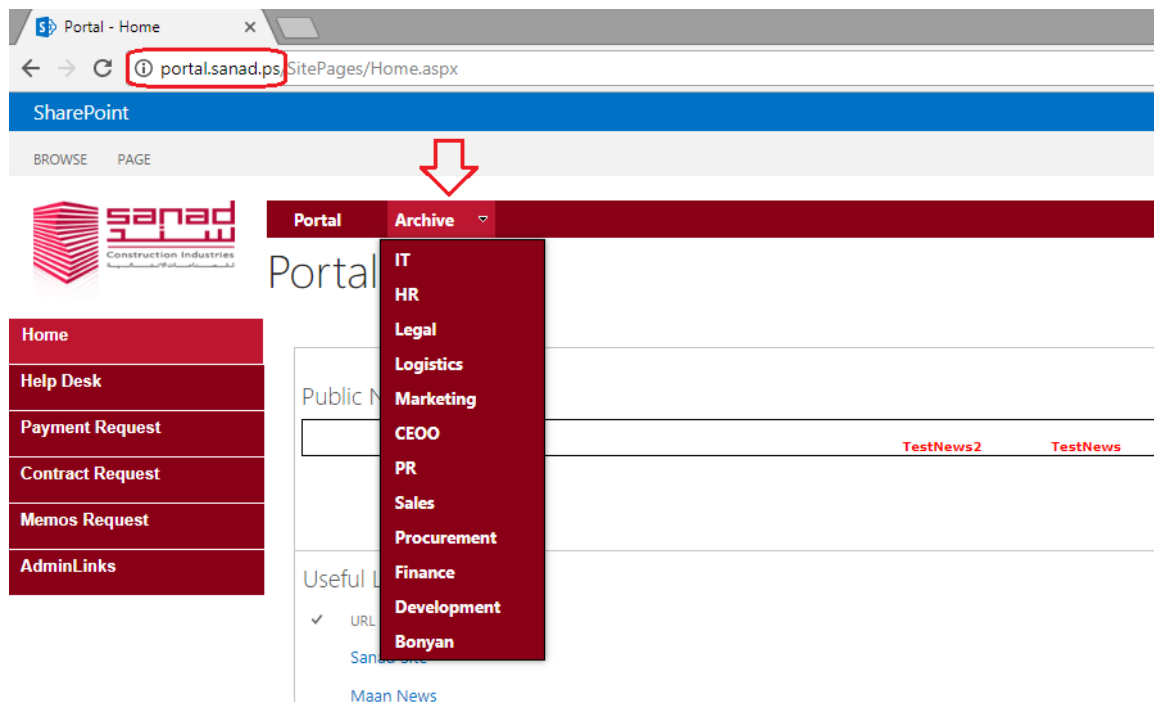
This system aims to facilitate and convert from manual archive to electronic archive by use SharePoint platform, this to improve time by find document and save soft copy for any document needed inside folder structure related to each department.

The main goals are:

- Improve related document
- Minimize the use of paper and emails
- Team collaboration and save employees time
- Improving search and data retrieval and tracking versions
- Reduce cost

System navigation

You can access archive system through SANAD main portal (<http://portal.sanad.ps>) in the top navigation there is a main link with name **“Archive”** under this link there are sub links to each department archiving system site. Moreover, from each site you can back to the portal from the same top navigation.



Archive site navigation

Archive home page

The screenshot shows the SharePoint 'IT Portal' home page. The browser address bar displays 'portal.sanad.ps/sites/IT/default.aspx'. The top navigation bar includes 'SharePoint', 'Newsfeed', 'OneDrive', 'Sites', and 'System Account'. Below this, a secondary bar shows 'BROWSE', 'PAGE', and 'IT Portal'. The main content area features a 'Documents' sidebar with a 'Site Contents' link, a 'Welcome to the Records Center' message, and a search bar. A red arrow points to the 'IT Portal' link in the top bar, with the text 'from here you go back to the portal'. Another red arrow points to the 'Documents' sidebar, with the text 'this link for the document library (where your documents exist)'. A third red arrow points to the search bar, with the text 'use this box to search document by its content'. A fourth red arrow points to a search box containing 'SANADIT-1-1', with the text 'this box enables you search document by its ID (auto generated ID)'. The search box is labeled 'Find by Document ID'. The main content area also includes a 'Search...' bar and a 'Documents' section with a '+ new document or drag files here' button. Below this is a table of documents.

Document ID	Name	Modified	Modified By	Created	Created By	File Size	Version
SANADIT-509775538-10	cement-mill	5 days ago	System Account	January 15	System Account	173 KB	1.0

Archive document library

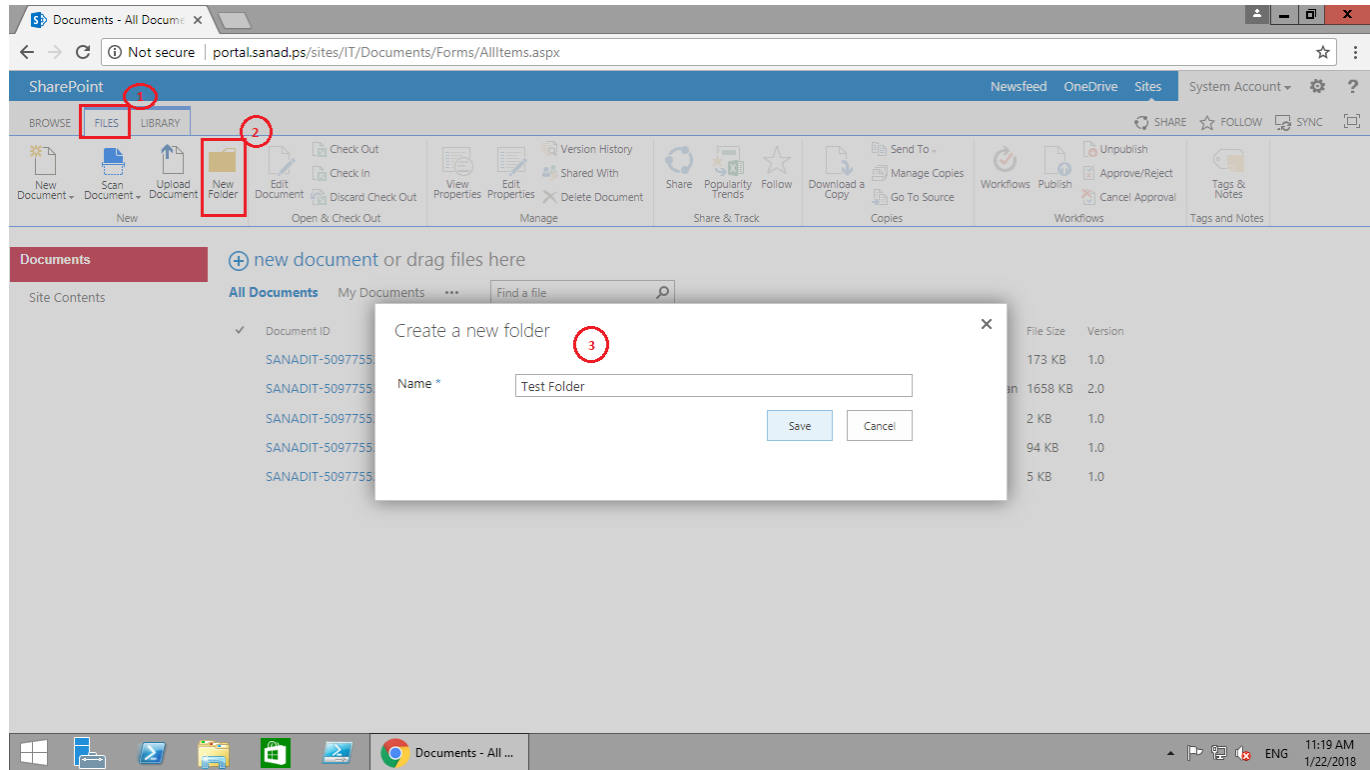
The screenshot shows the SharePoint 'Documents' page. The browser address bar displays 'portal.sanad.ps/sites/IT/Documents/Forms/AllItems.aspx'. The top navigation bar includes 'SharePoint', 'Newsfeed', 'OneDrive', 'Sites', and 'System Account'. Below this, a secondary bar shows 'BROWSE', 'FILES', 'LIBRARY', and 'IT Portal'. A red arrow points to the 'FILES' tab, with the text 'This is the tools ribbon for the document library'. The main content area features a 'Documents' sidebar with a 'Site Contents' link, a '+ new document or drag files here' button, and a search bar. Below this is a table of documents.

Document ID	Name	Created	Created By	File Size	Version
SANADIT-509775538-10	cement-mill	January 15	System Account	173 KB	1.0
SANADIT-509775538-13	G-Palestine Medical Network - April 15	Yesterday at 1:28 AM	Abdallah Abdelrahman	1658 KB	2.0
SANADIT-509775538-12	jquery.li-scroller.1.0	5 days ago	System Account	2 KB	1.0
SANADIT-509775538-9	steel	January 15	System Account	94 KB	1.0
SANADIT-509775538-11	trucks	January 15	System Account	5 KB	1.0

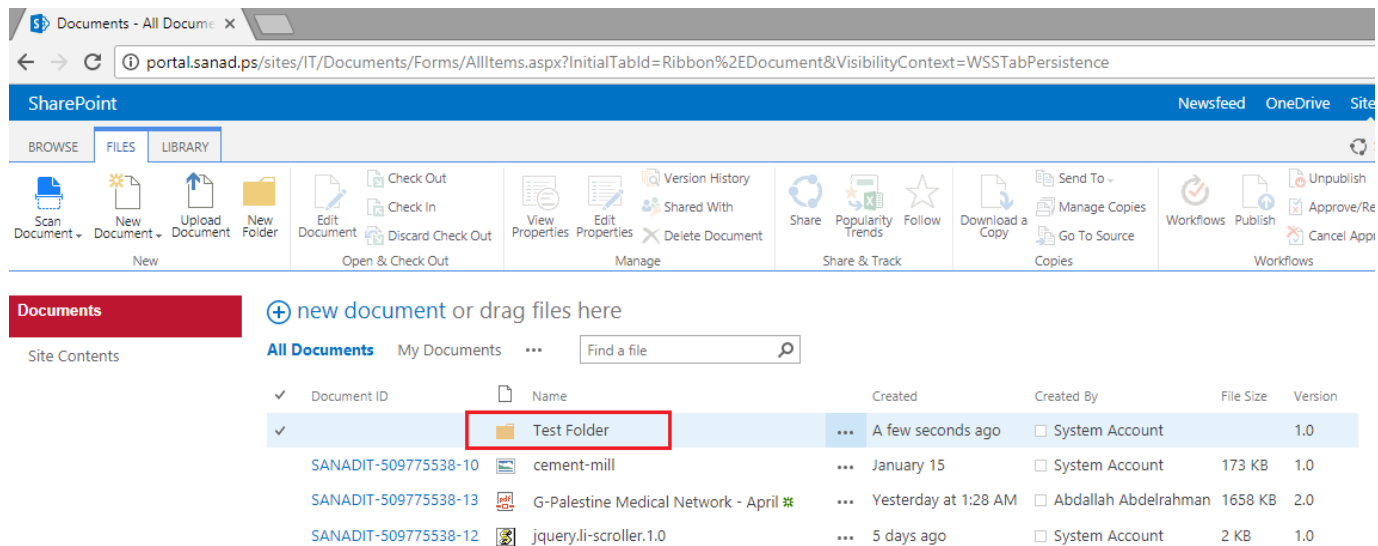
Archive system main features

Create folder

You can create folders, as you want inside the document library. By clicking on the top ribbon inside the document library

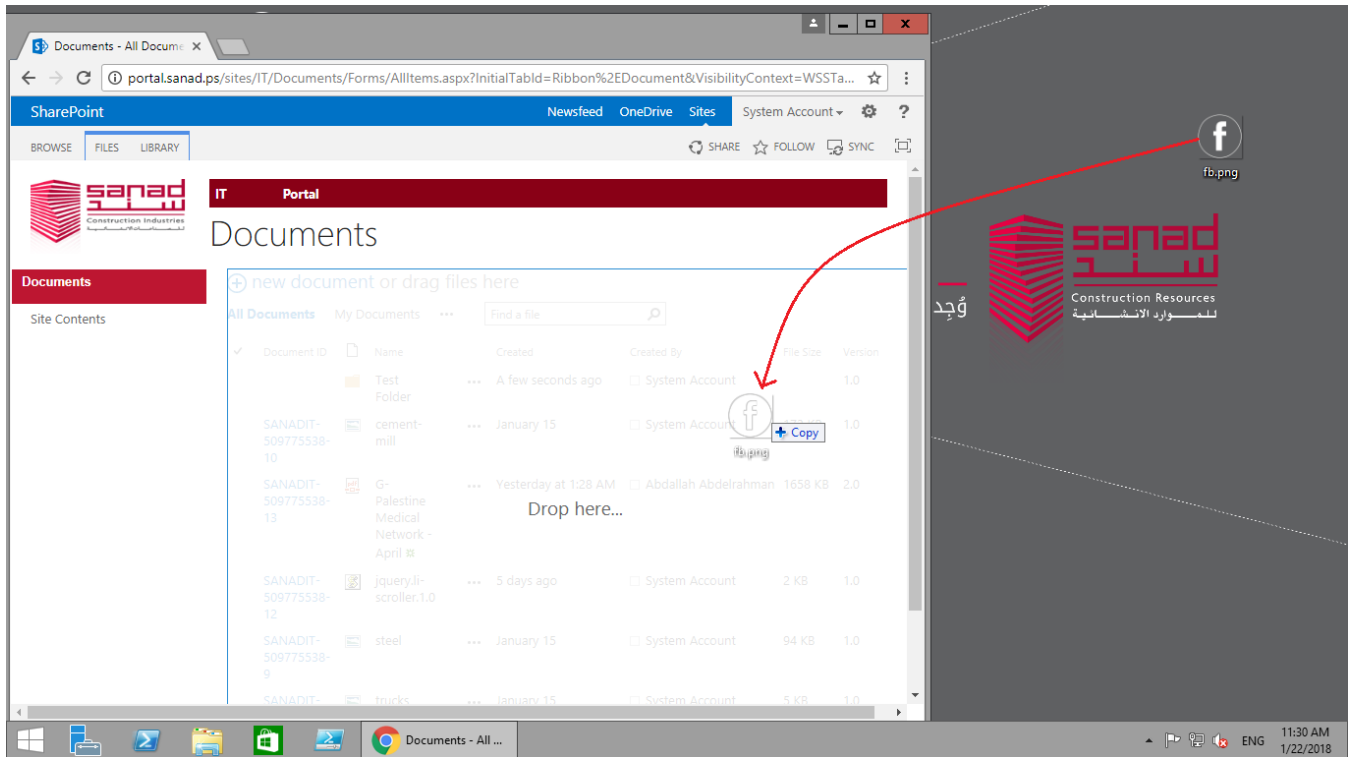


Then the folder shown in the document library:

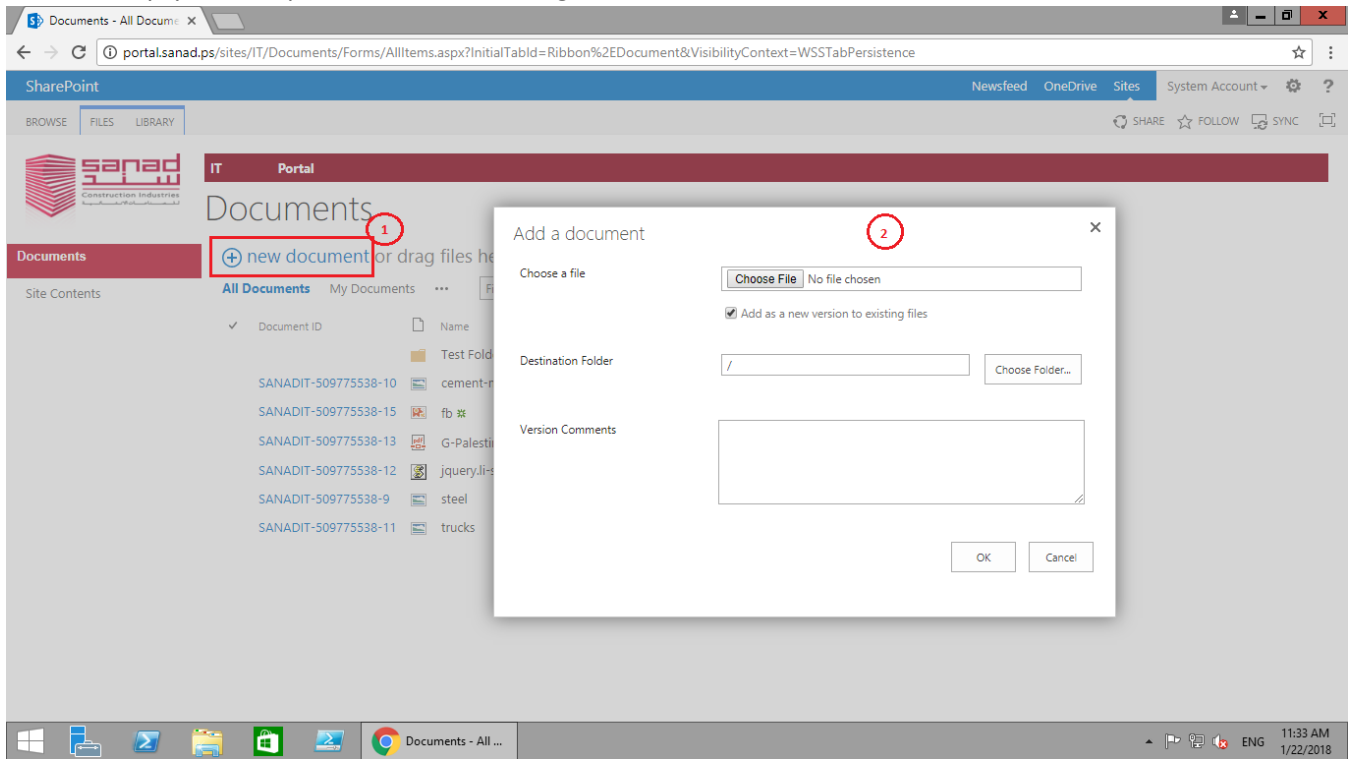


Upload files/documents

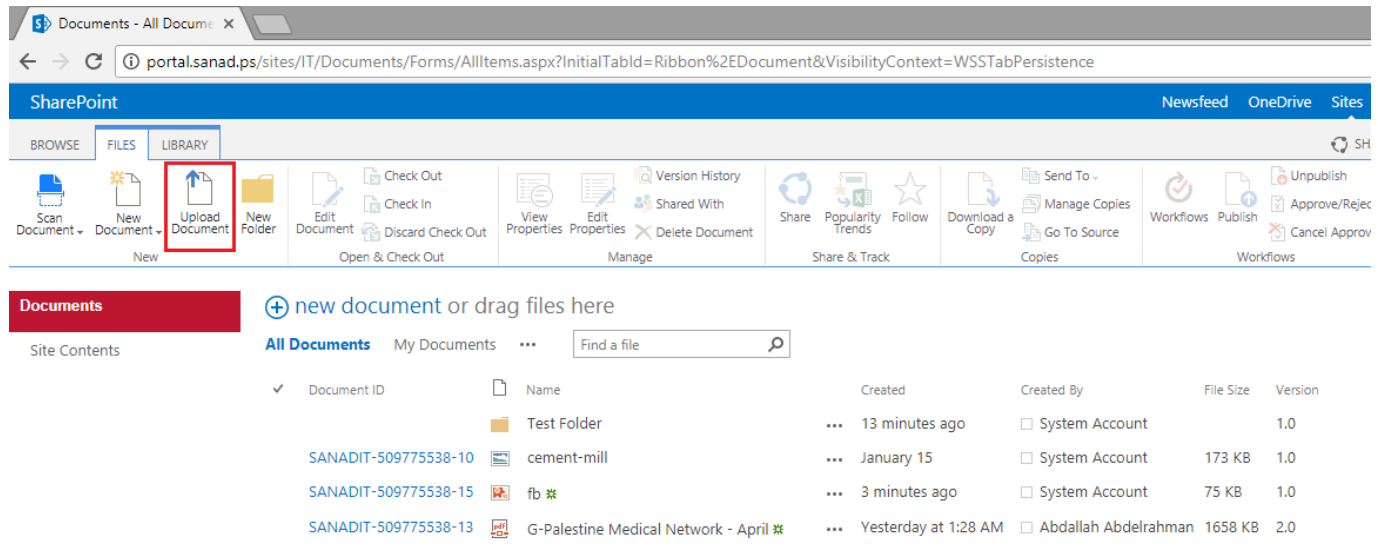
You can upload files through drag drop it in the document library



Alternatively, you can upload document through the new document button



On the other hand, you can upload document through the upload button that exists in the tools ribbon

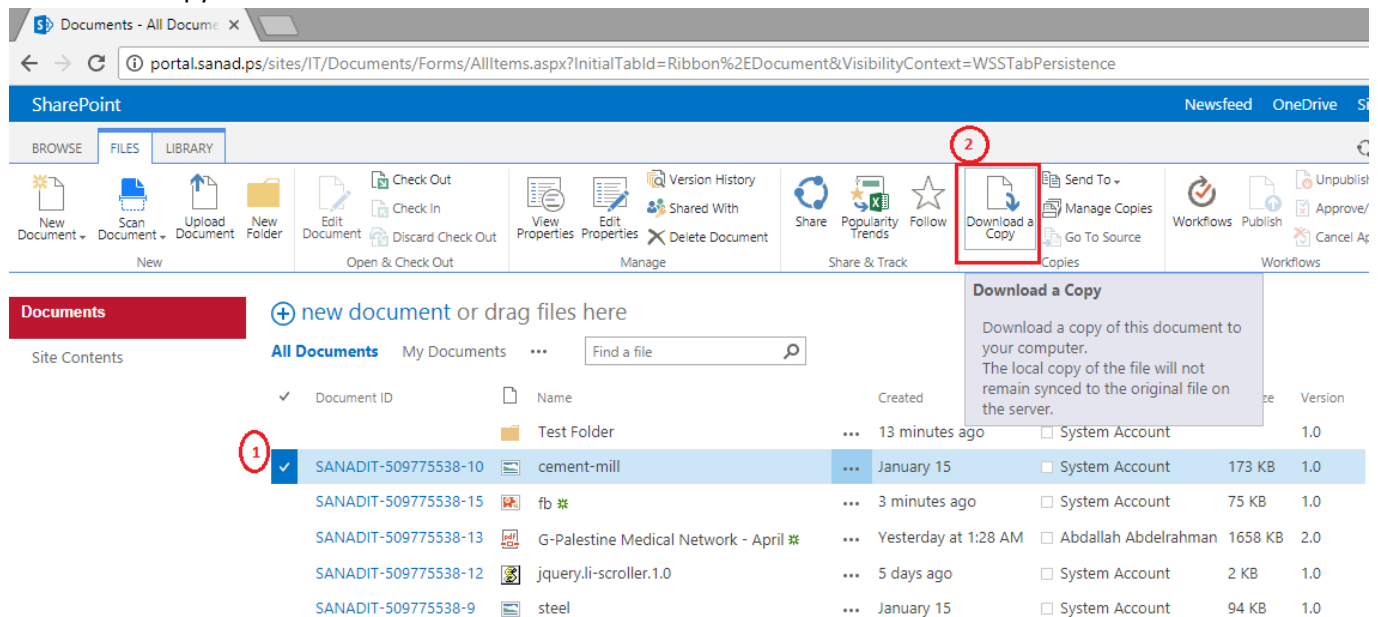


The screenshot shows the SharePoint interface with the 'FILES' tab selected. The 'Upload Document' button is highlighted with a red box. Below the ribbon, the 'Documents' section is visible, showing a list of documents. The 'Upload Document' button is located in the 'FILES' tab of the ribbon, under the 'New' group.

Document ID	Name	Created	Created By	File Size	Version
	Test Folder	13 minutes ago	System Account		1.0
SANADIT-509775538-10	cement-mill	January 15	System Account	173 KB	1.0
SANADIT-509775538-15	fb	3 minutes ago	System Account	75 KB	1.0
SANADIT-509775538-13	G-Palestine Medical Network - April	Yesterday at 1:28 AM	Abdallah Abdelrahman	1658 KB	2.0

Download a copy from a document

Select the document you want to download a copy from it, and go to ribbon and click the download a copy button.



The screenshot shows the SharePoint interface with the 'FILES' tab selected. The 'Download a Copy' button is highlighted with a red box. Below the ribbon, the 'Documents' section is visible, showing a list of documents. The document 'cement-mill' is selected with a red box. The 'Download a Copy' button is located in the 'FILES' tab of the ribbon, under the 'Copies' group.

Document ID	Name	Created	Created By	File Size	Version
	Test Folder	13 minutes ago	System Account		1.0
SANADIT-509775538-10	cement-mill	January 15	System Account	173 KB	1.0
SANADIT-509775538-15	fb	3 minutes ago	System Account	75 KB	1.0
SANADIT-509775538-13	G-Palestine Medical Network - April	Yesterday at 1:28 AM	Abdallah Abdelrahman	1658 KB	2.0
SANADIT-509775538-12	jquery.li-scroller.1.0	5 days ago	System Account	2 KB	1.0
SANADIT-509775538-9	steel	January 15	System Account	94 KB	1.0

On the other hand, you can download the document from document properties

The screenshot shows the SharePoint 'Documents' page for a document named 'cement-mill.jpg'. A context menu is open over the document, displaying various actions. The 'Download a Copy' option is highlighted with a red box and a red circle. Other options include 'View Properties', 'Edit Properties', 'Check Out', 'Version History', 'Compliance Details', 'Workflows', 'Shared With', and 'Delete'. The document list below shows several items, with 'cement-mill' selected. The URL in the address bar is 'portal.sanad.ps/sites/IT/Documents/Forms/AllItems.aspx?InitialTabId=Ribbon%2EDocument&VisibilityContext=WSSTabPersistence'.

Delete a document

You can delete a document from the ribbon or from the document property after select the document

The screenshot shows the SharePoint ribbon with the 'Delete Document' button highlighted. The ribbon includes tabs for 'BROWSE', 'FILES', and 'LIBRARY'. The 'FILES' tab is active, showing various document management actions. The 'Delete Document' button is located in the 'Manage' group. Below the ribbon, the document list is visible, with 'cement-mill' selected. The document properties table is shown below the list.

Document ID	Name	Created	Created By	File Size	Version
SANADIT-509775538-10	cement-mill	January 15	System Account	173 KB	1.0
SANADIT-509775538-15	fb	3 minutes ago	System Account	75 KB	1.0
SANADIT-509775538-13	G-Palestine Medical Network - April	Yesterday at 1:28 AM	Abdallah Abdelrahman	1658 KB	2.0
SANADIT-509775538-12	jquery.li-scroller.1.0	5 days ago	System Account	2 KB	1.0

Document version history

User can check the version history of a specific document through the ribbon or from document property

The screenshot shows a SharePoint document library interface. The ribbon at the top has a 'Version History' button highlighted with a red circle and the annotation '2 click on the version history button in the ribbon to view versions of the document'. Below the ribbon, a list of documents is shown. The document 'G-Palestine Medical Network - April' is selected, and a red circle with the annotation '1 select the doc you want to check its version history' points to it. A 'Version History' pop-up window is displayed, showing a table of document versions. The pop-up has a red circle with the annotation '3 a pop up will appear to show you the versions details for the doc'.

No.	Modified	Modified By	Size	Comments
2.0	1/22/2018 12:42 AM	System Account	1.6 MB	
1.0	1/21/2018 1:28 AM	Abdallah Abdelrahman	1.6 MB	

Document metadata

When upload a document there are a lot of built in fields that give some information about the document like created date, created by, size, version, file type ...etc.

The screenshot shows a SharePoint document library interface. The ribbon at the top has a 'Version History' button highlighted with a red circle and the annotation '2 click on the version history button in the ribbon to view versions of the document'. Below the ribbon, a list of documents is shown. The document 'G-Palestine Medical Network - April' is selected, and a red circle with the annotation '1 select the doc you want to check its version history' points to it. A 'Version History' pop-up window is displayed, showing a table of document versions. The pop-up has a red circle with the annotation '3 a pop up will appear to show you the versions details for the doc'.

Document ID	Name	Modified	Modified By	Created	Created By	File Size	Version
SANADIT-509775538-10	cement-mill	...	System Account	About an hour ago	System Account	1.6 MB	1.0
SANADIT-509775538-15	fb	...	System Account	...	System Account	75 KB	1.0
SANADIT-509775538-13	G-Palestine Medical Network - April	Yesterday at 1:28 AM	Abdallah Abdelrahman	...	Abdallah Abdelrahman	1658 KB	2.0
SANADIT-509775538-12	jquery.li-scroller.1.0	...	System Account	5 days ago	System Account	2 KB	1.0
SANADIT-509775538-9	steel	...	System Account	January 15	System Account	94 KB	1.0
SANADIT-509775538-11	trucks	...	System Account	January 15	System Account	5 KB	1.0

Document library views

There are two views for the document library, all doc view (shows all documents) and my doc view (shows the document uploaded by me).

The screenshot shows the SharePoint 'Documents' library interface. The 'My Documents' view is selected, indicated by a red box and a red arrow. The interface includes a search bar, a list of documents, and a table of document metadata.

Document ID	Name	Modified	Modified By	Created
	Test Folder	About an hour ago	System Account	Abc
SANADIT-509775538-9	steel	January 15	System Account	Jani
SANADIT-509775538-10	cement-mill	5 days ago	System Account	Jani

Search document by document ID

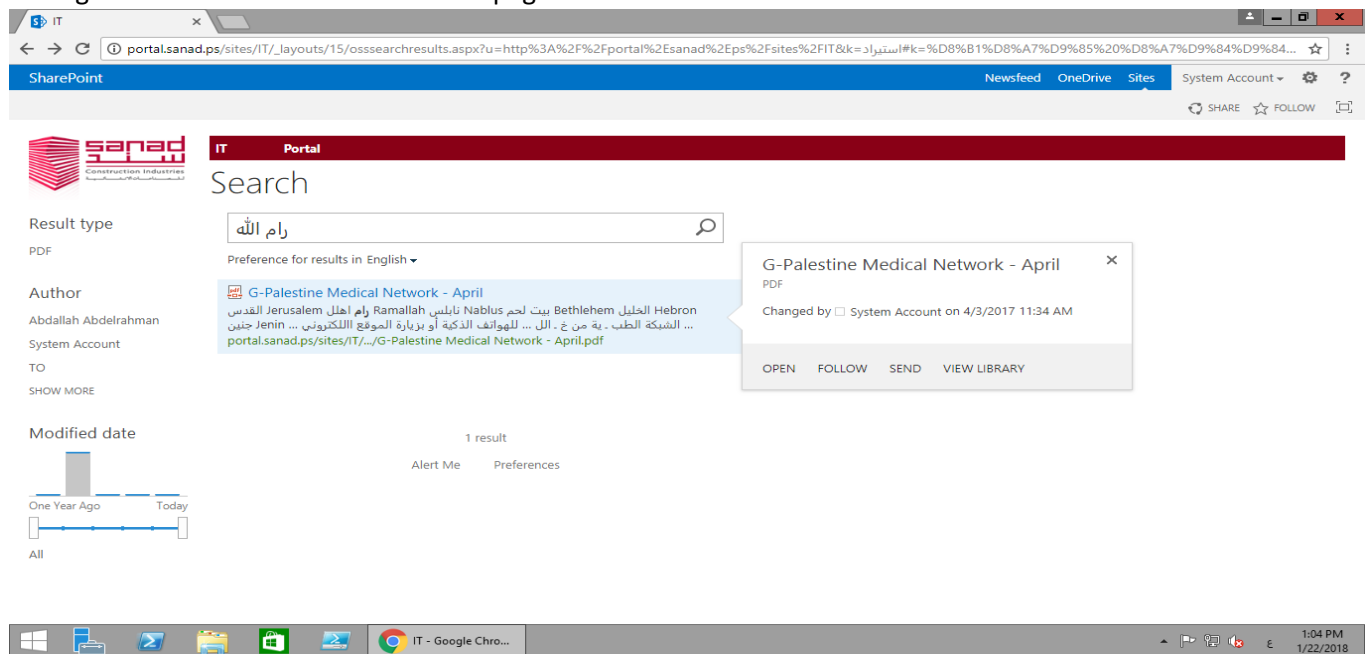
Document ID is an auto generated ID by the System and appear in document metadata, each document in the system has a specific ID. User can search document by its ID through the search doc by ID box that exists in the site home page.

The screenshot shows the 'Welcome to the Records Center' page. A search box labeled 'Find by Document ID' is highlighted with a red box and a red circle. The page also includes a 'Search...' box and a table of document metadata.

Document ID	Name	Modified	Modified By	Created	Created By	File Size	Version
SANADIT-509775538-10	cement-mill	5 days ago	System Account	January 15	System Account	173 KB	1.0
SANADIT-509775538-11	...	About an hour ago	System Account	About an hour ago	System Account	75 KB	1.0

Search document by its content

User can search for a document if he just remember some words from inside the document through the search box in the site home page.



Filter document by its metadata and Order document ascending and descending

User can filter documents by its metadata (for example, you can show the documents that created in specific date), moreover user can order documents in the list to make document access easier.

