DOCUMENT GOVERNANCE
Document Review

CIM Applications

User manual for the CIM Document Management System V1.

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Note: CIM – Can be customised for your organisation. E.g., Logos, Categories, Subcategories, and many user options, can be customised according to you Organisation s requirements.

User Manual Contents

Login Page
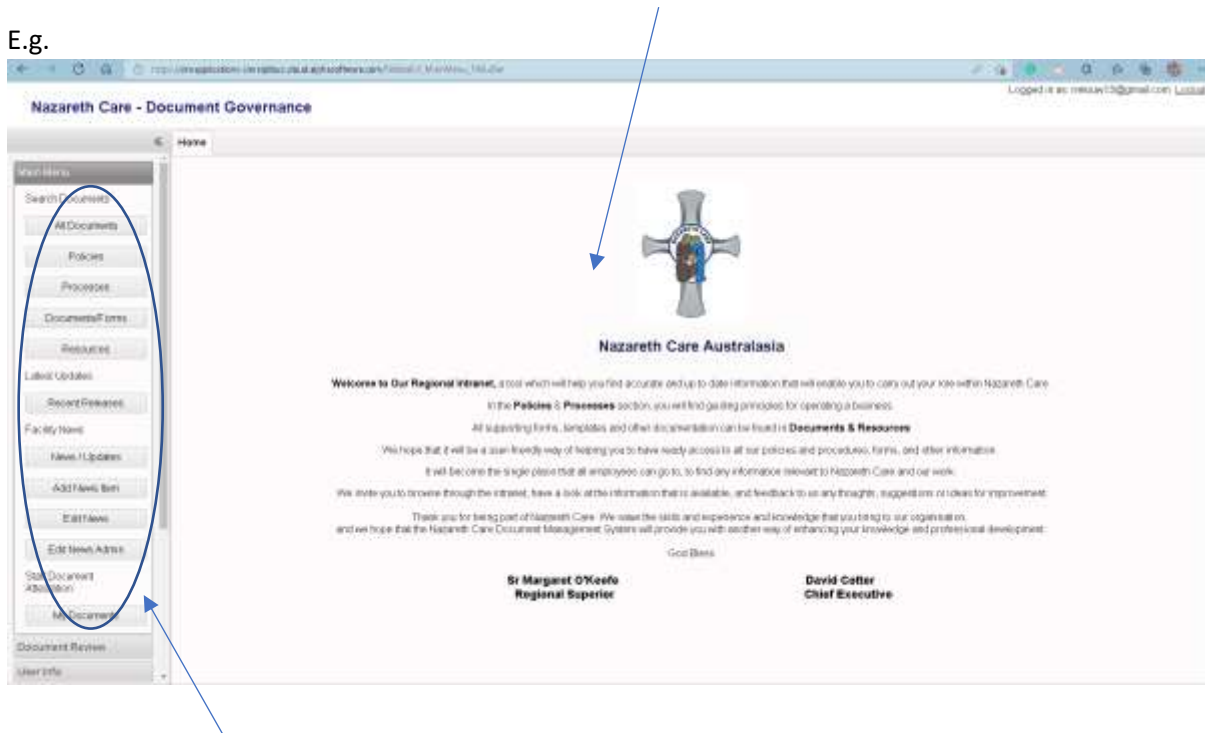
Login page:

1. Enter – Email address

1. Enter your password *(Default = 123456@)*
2. *Click the "Login" button.*

Home Page

The home page is the starting page you will see every time you first login to the Site.

All documents and Content will be displayed in the **Main window area**.

E.g.

The **Menu / Navigation** buttons will always be found on the Left-hand side of screen.
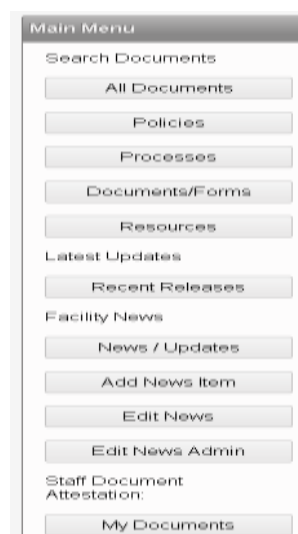
The menu items will be discussed below.

If the user clicks the **MAIN** menu buttons this will expand or collapse a **SUBMENU**.

E.g.

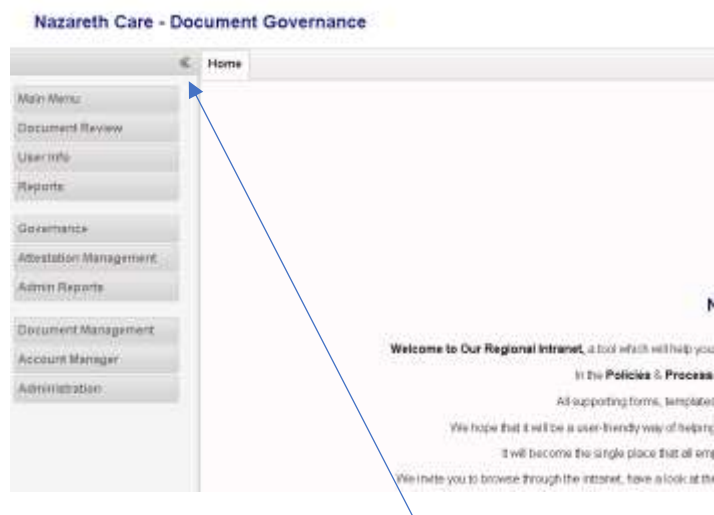**Main Menu** collapsed.   **Main Menu** Expanded.

Note: Each user will only see buttons for which their security access allows.

"Main Menu" – Functions

The main menu can also be hidden to give the user more space to view Documents.

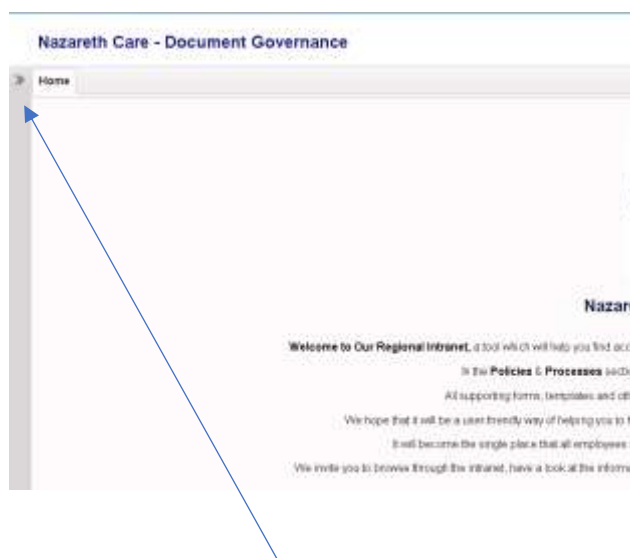By Default, the menu will be shown.

e.g.

To hide the menu and allow more visible space click the Button.

This will **collapse and hide** the menu.

e.g.

To show the menu click once again, click the button. This will then expand and show the menu.

Note: The menu can be hidden or expanded at any time.

Reviewing a Document

Specific staff will be given security access to review a document. This allows the user to view NEW or UPDATED document and add comments.
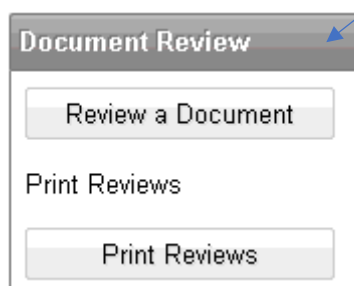
All document reviews are taken into account to improve the document and gain input from staff that have specialised knowledge for document content.

The view documents can be access by clicking on the Main Menu button

This wil then show the Submenu for reviewing a document.

E.g.

To see a list of all the document that have been made ready for review click the "Review a Document" Button. In the example below there is one document available for Review called "Occupational Violence" Note all views open in separate TABS shown top of page.

e.g.

To view the actual document and add comment click the Review button.

This will then display the DOCUMENT & COMMENTS TAB section. (Next Page)

Document Review: (Pt 1)

When loaded the TAB will be displayed in two sections (LEFT / RIGHT)

The DOCUMENT on the left and the Viewers Comments on the right.

e.g.

Left side of the screen – DOCUMENT

This will display the lasted version of the document with any alterations as suggested by reviewers.

The aim is for a user to review – (READ) the document and add any suggested changes, suggestions on the right side.

The document will always have the review status – "Under Review"

e.g.

Document Review: (Pt 2)

Right side of the screen – Reviewer Comments. On the right side of the screen the user can read any comments entered by previous viewers. And they can also add their own comments.

E.g. Review comments

Each comment can have a response from the Document Administrator, which will be entered as well.

To add you own comment click the ✚ found at the bottom of the comments, this will then add a blank comment section for the user to add any additional comments. Once this has been done, the user will need to click the [💾 Submit] button, also at the bottom of the comments section.

When the user has finished adding any comments, they can close the TAB by clicking the ✖ at the top. (The corresponding TAB will close).

e.g.
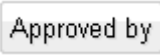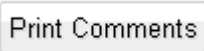
Review Document – TAB

IN the initial – Review Document TAB, there will list all documents that are for review. In the example shown below there is only on document for review. E.g. "Occupational Violence"

From this screen the user can view a lot of information about the documents.
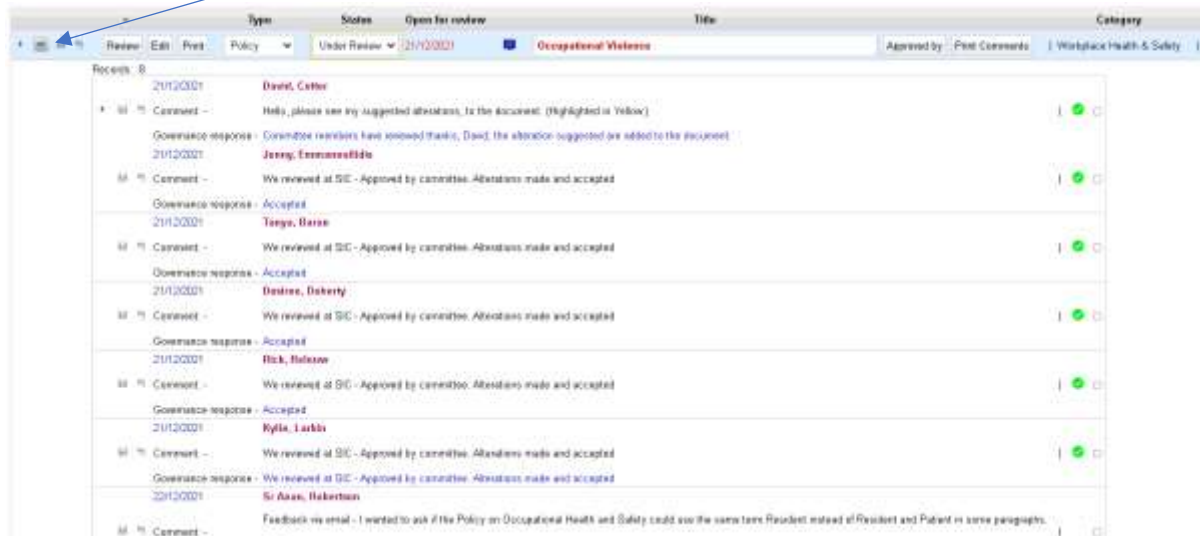
1. **All comments** – made about this document by clicking the [+] Button.

2. **Review the document** by clicking the [Review] Button**.**

3. **Print the Document –** by clicking the [Print] Button.

4. View all the people who have **approved the document** by clicking the [Approved by] Button

5. Print out all the comments by clicking the [Print Comments] Button.

An example of these are shown next pages.

View all comments.

Made about this document by clicking the Button
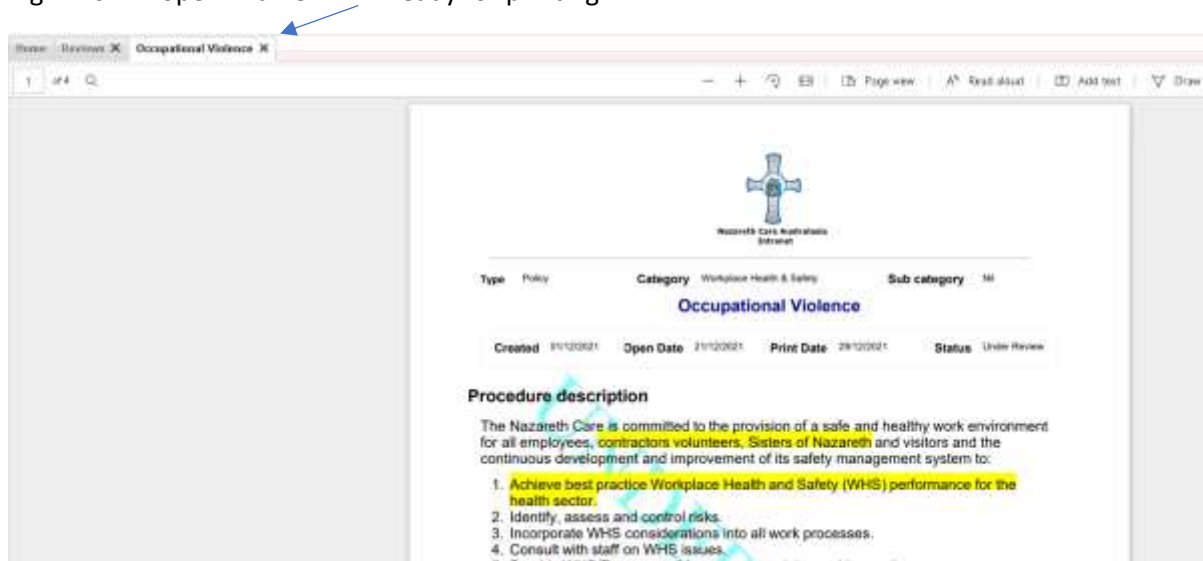
e.g.

Review the document

By clicking the | Review | Button – Refer to page 5.

Print the Document

By clicking the | Print | Button.

E.g. This will open in a new **TAB** ready for printing.

View all the people who have **approved the document**

By clicking the Approved by Button.

e.g.

Print out all the comments

By clicking the **Print Comments** Button.

E.g.

This will open in a new **TAB**.

e.g.