



DOCUMENT GOVERNANCE USER MANUAL

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 your Organisation's requirements.

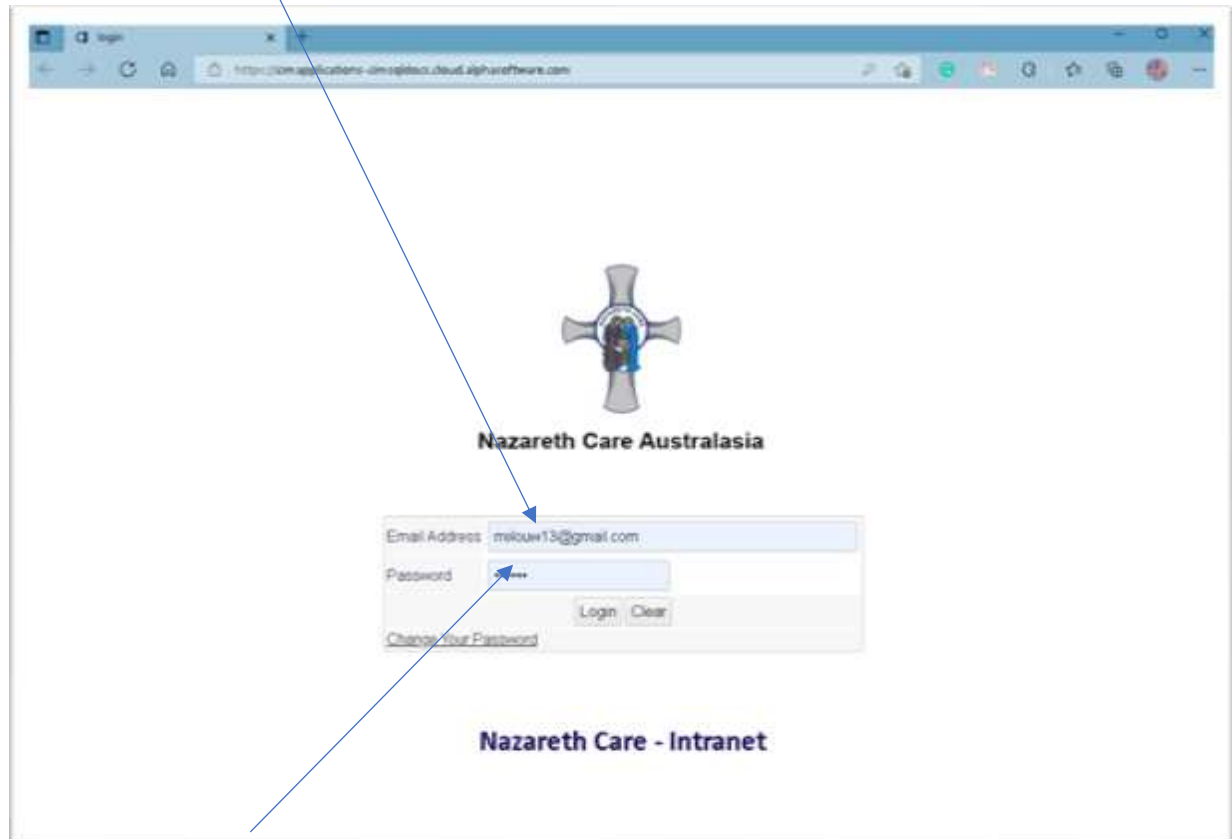
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Login Page

Login page:

1. Enter – Email address



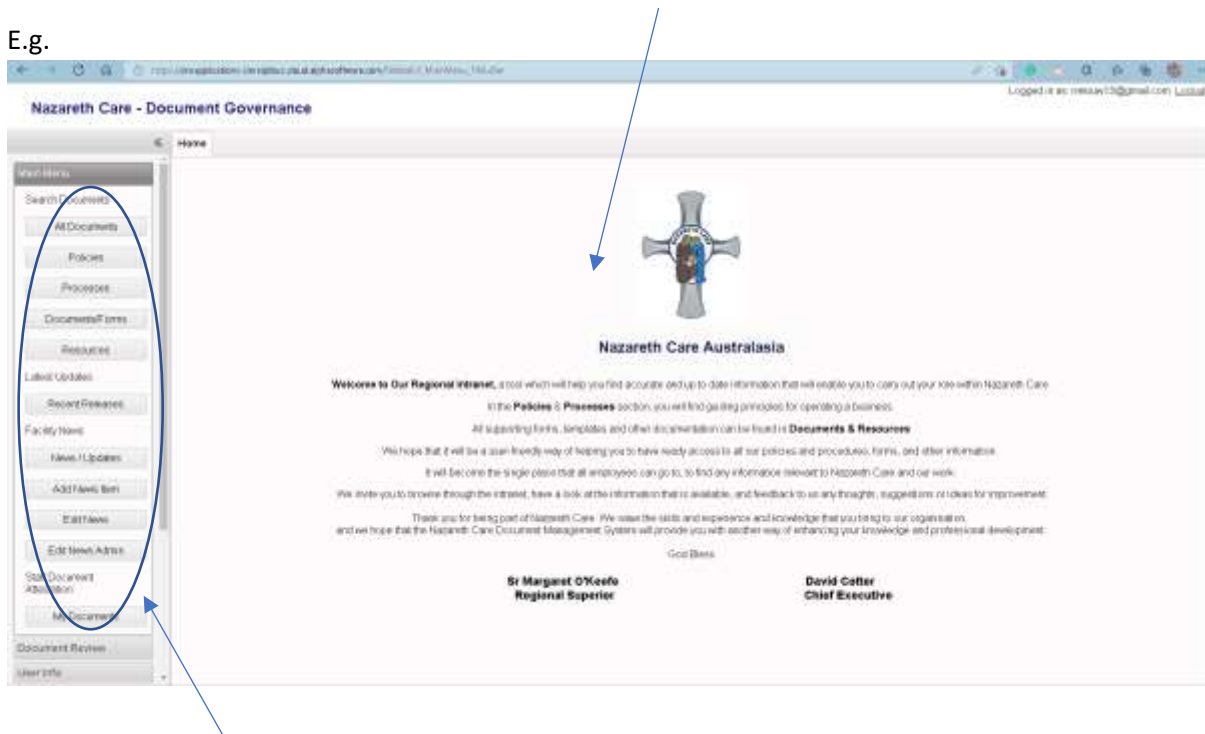
1. Enter your password (*Default = 123456@*)
2. Click the "Login" button.

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.

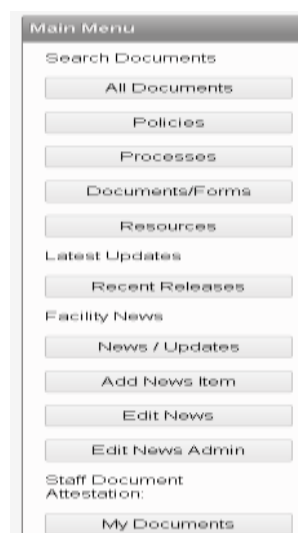
If the user clicks the **MAIN** menu buttons this will expand or collapse a **SUBMENU**.

E.g.

Main Menu collapsed.



Main Menu Expanded.



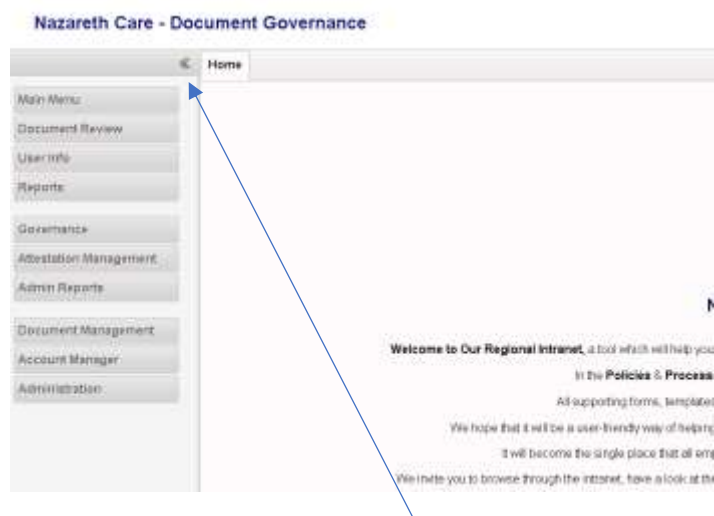
Note: Each user will only see buttons for which their security access allows.


“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.

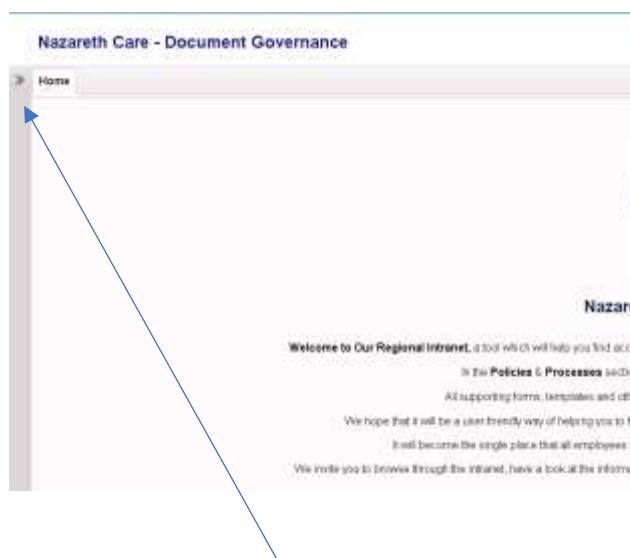
e.g.



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.

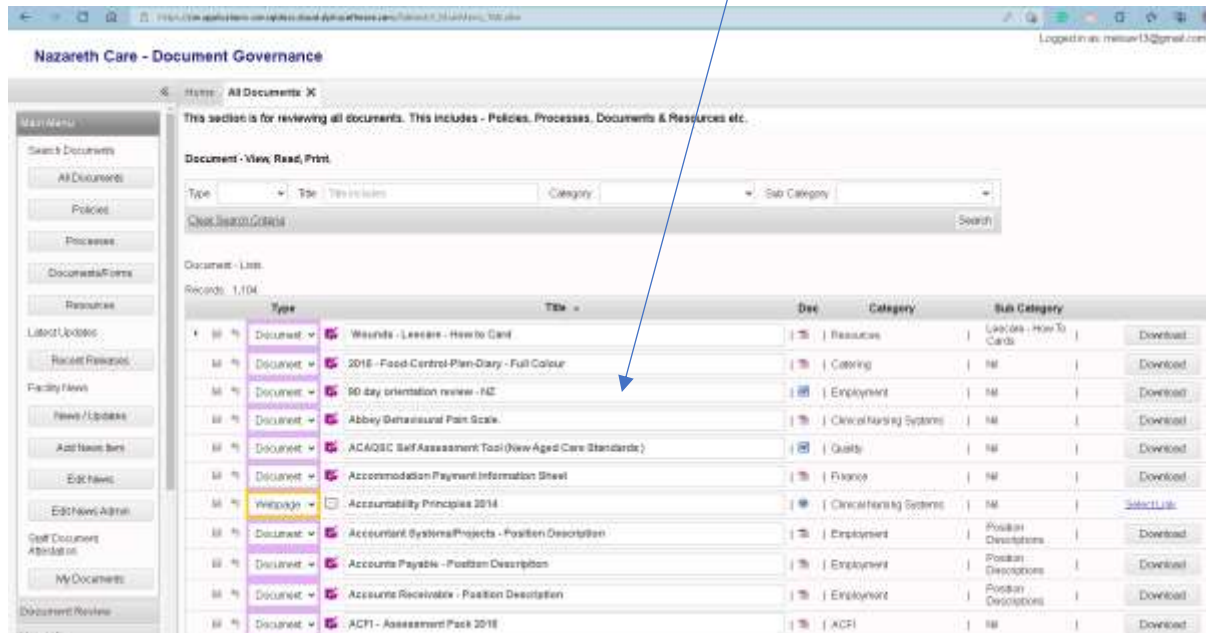
Viewing – Documents

All Documents

To view all the documents that are located on the Intranet click the button on the Main Menu.

Note: The webpage will then display a list of all documents on the intranet.

E.g.



Depending on the TYPE of document, you will be able to either View, Download or open in new Tab.

Document Types

Document Types - The option available will be as follows

1. **Documents** e.g., Forms, Charts, Books, (Word/PDF) will have a “**DOWNLOAD**” button
2. **Policies** – Will have a “**VIEW**” Button.
3. **Processes** – Will have a “**VIEW**” Button.
4. **Webpages** – Will have a “**SELECT LINK**”. (*Opens in a new Browser Tab*)

How to find a Document: (Pt 1)

When looking at a list of documents there will always be a **FILTER OPTIONS** at the top, and if used will make finding a document very easy.

e.g. FILTER OPTIONS



Document - View, Read, Print.

Type Title Title Includes Category Sub Category

[Clear Search Criteria](#)

In the example above, can filter by select either the “**Type**” of documents and / or enter a few letters of the “**Title**” of a document or choose a “**Category**” to filter the list.

When any of the above options are selected, next click the search button and it will apply the filter and show only related documents according to your filter criteria.

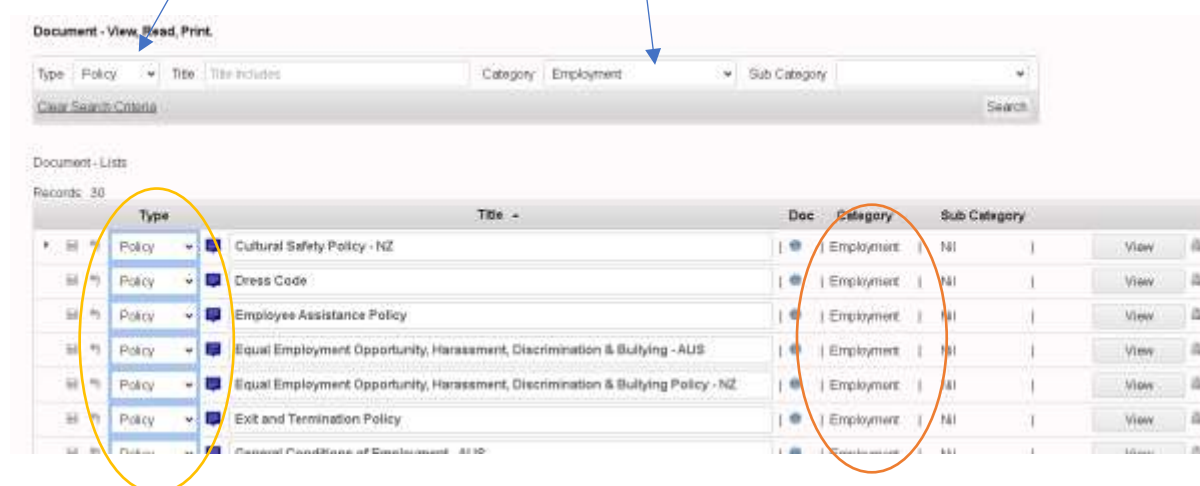
e.g.

In the sample below a **filter is applied**

e.g., to search for “**Policy**” and for Category “**Employment**”

e.g.

The result shown below



Document - View, Read, Print.

Type: Policy Title: Title Includes Category: Employment Sub Category:

[Clear Search Criteria](#)

Document - Lists

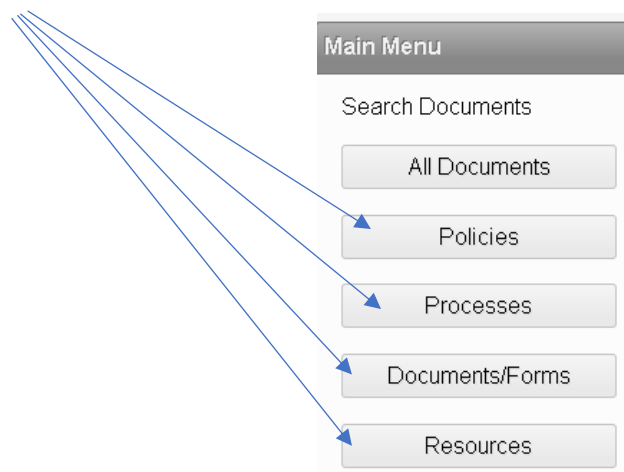
Records: 30

Type	Title	Doc	Category	Sub Category	
Policy	Cultural Safety Policy - NZ		Employment	NI	View
Policy	Dress Code		Employment	NI	View
Policy	Employee Assistance Policy		Employment	NI	View
Policy	Equal Employment Opportunity, Harassment, Discrimination & Bullying - AUS		Employment	NI	View
Policy	Equal Employment Opportunity, Harassment, Discrimination & Bullying Policy - NZ		Employment	NI	View
Policy	Exit and Termination Policy		Employment	NI	View
Policy	General Code of Conduct - 2010		Employment	NI	View

How to find a Document: (Pt 2)

Using the menu buttons the user can go straight to a Document **TYPE** therefore automatically narrowing the search list by the relevant TYPE selected.

E.g. Type of Documents



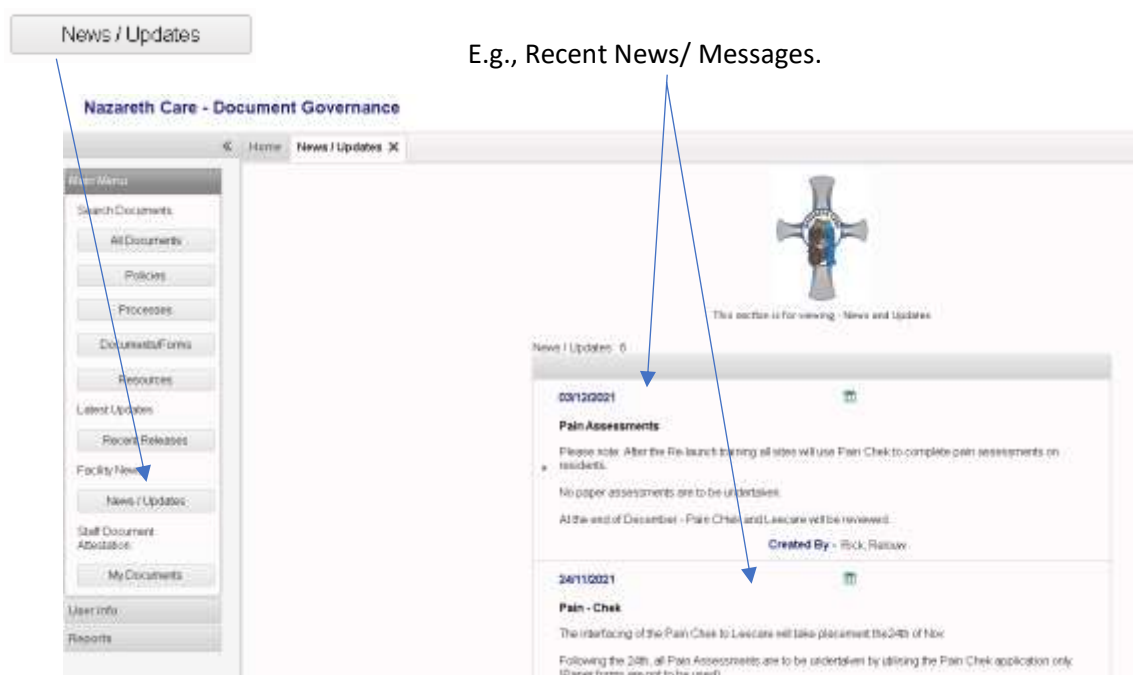
Alternatively, the user can see the documents have recently been updated by clicking the



News / Updates

The system can also display the latest information and messages for users, which have been entered into the system.

E.g., Manager News, Upcoming events, Relevant Communication.



User Information

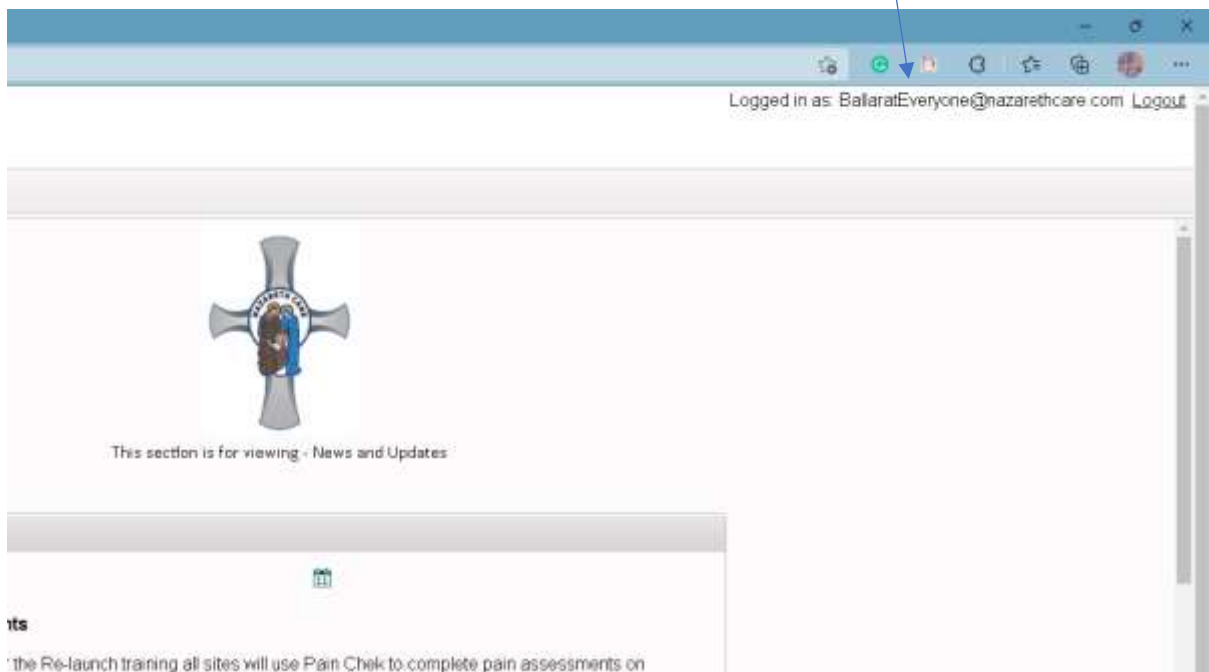
At any time, a user can see who they are logged in as, by clicking the “**User Info**” button found on the main menu.

E.g.



Alternatively, the top right corner of the Screen will also show **who is logged into the system**

E.g.

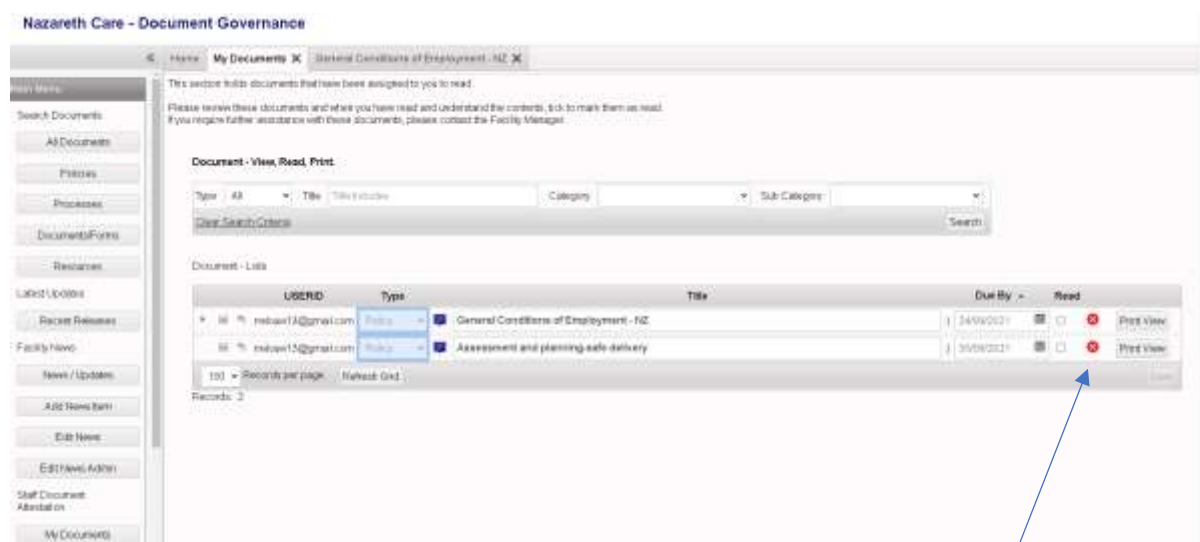



My Documents

A user can be assigned any specific documents by the manager or HR dept as required reading and acknowledgment. (*Attestation*)

A user can see if a document is allocated to them to read by logging via their details, and clicking the **"MY DOCUMENTS"** button.

E.g., In the example below, a user has logged in under their name, and clicked the **"My Documents"** button.

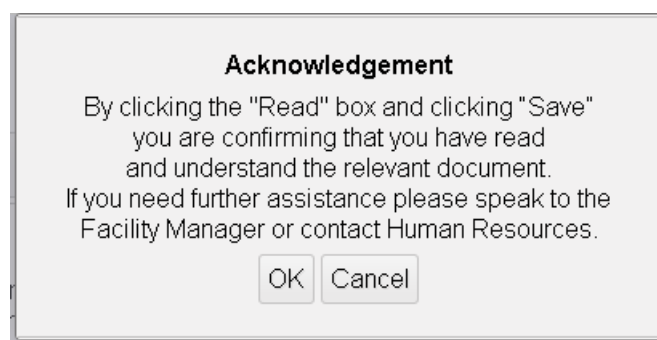




In the reading section there is two documents allocated to this user. (As above) Both documents have a  indicating they have not been read and/or acknowledged by the User.

The user can click the **"Print View"** button to read the documents and when satisfied can tick the Read ☐ box.

Note: When the user ticks the **READ** box, a notification will appear.

e.g.



If the user clicks **"OK"** button and then saves the record the  will turn to  indicating the document has been read by the logged in user, and he/she acknowledges they understand the contents of the Policy/Process.

Note: The manager and HR Manger can access and see which users have read documents and which users still have not acknowledged their documents.

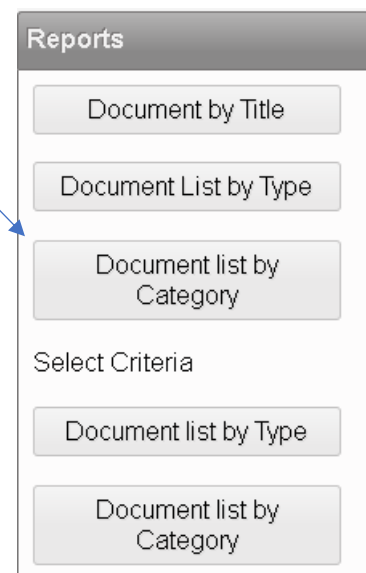
Reports

The main menu also has a report section this can be expanded by clicking the parent Button for

Reports e.g.

Reports

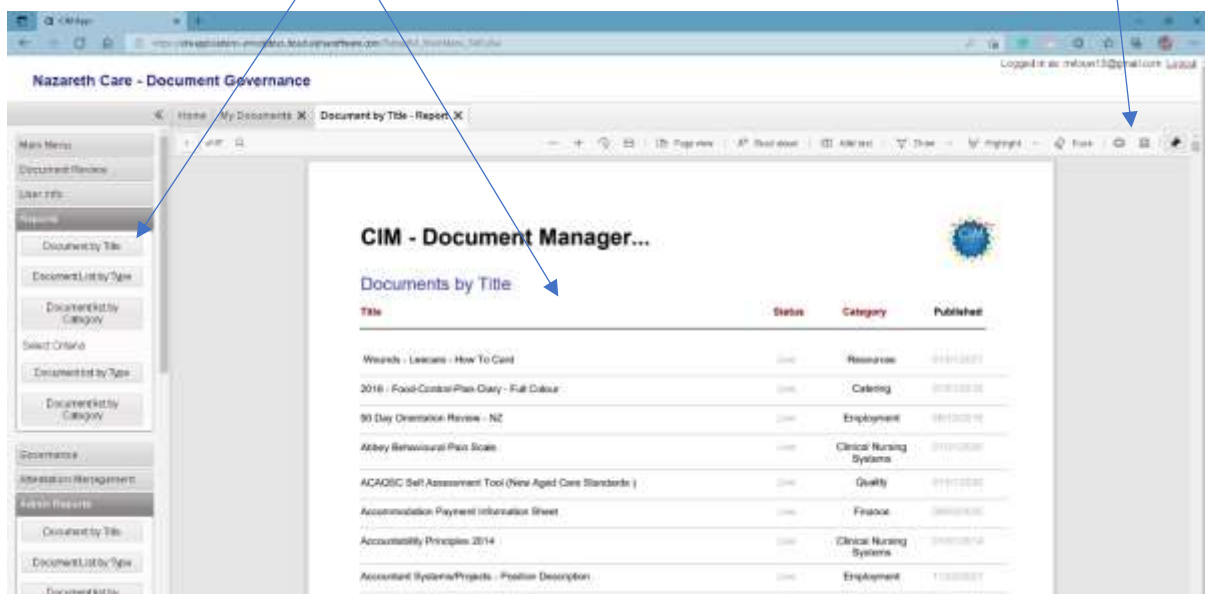
expanded to show additional buttons



When any of the report buttons are clicked, the report will display in the Display section and can be printed on any local printer.

e.g., Example of reports **"Documents by Title"**


Print Button



Printing Documents

Note: Only users who have security access can print documents. This is usually assigned by the nominated administrator of the Web site.

The document that can be printed are – **Policies or Processes.**

When viewing either of these in a list, click the PRINT icon. ()

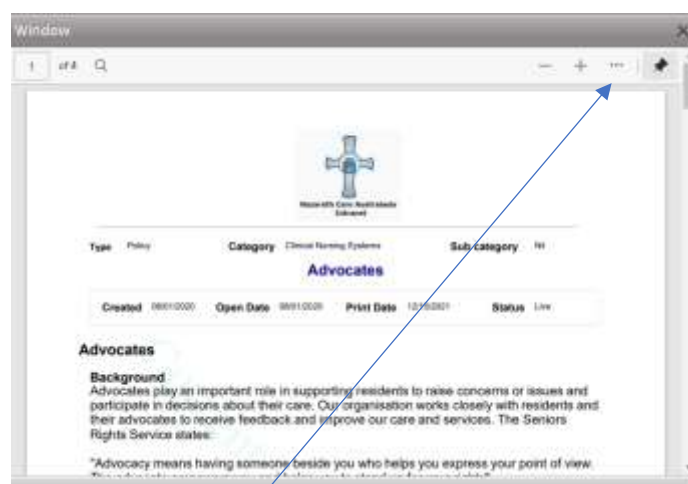
e.g.



Policy	Advocates	Clinical Nursing Systems	NI	View	
Policy	Antimicrobial Stewardship - Policy - AUS	Clinical Nursing Systems	NI	View	
Policy	Antimicrobial Stewardship Policy - NZ	Clinical Nursing Systems	NI	View	
Policy	Assessment and planning - made, made and reference	Clinical Nursing Systems	Compendia	View	

When click a new window will open on top of the List displaying the documents in PDF form.

e.g.



To see the print option, click on the ... dots top right corner. This will show additional option including PRINT.

e.g.

