



Training Guide

DAMS Version 1.0

Digital Asset Management Solution (DAMS)

U.S. Department of Housing and Urban Development

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Solution Information

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Table of Contents

Contents

1. DAMS Overview	1
1.1 Features.....	1
1.2 Configuration	1
1.3 Data Flows	2
2. Getting Started.....	3
2.1 Software Version.....	3
2.2 DAMS Requirements.....	3
2.3 Access Information	3
2.4 Logging On	4
2.4.1 First Time Login	4
2.4.2 Recover from a Forgotten Password.....	14
2.4.3 Reset/Change Password	14
2.5 Inactivity Warning and Log Out	16
3. DAMS User Dashboard.....	18
3.1 My Sites	19
3.2 My Tasks.....	22
3.3 My Activities	22
3.4 My Documents.....	24
4. Search for a Document.....	24
4.1 Browse and Auto Suggest.....	24
4.2 Full and Partial Text.....	24
4.3 Advanced.....	30
5. Viewing a Document	35
5.1.1 Document Menus.....	36
6. Create a Folder	38
7. Document Management	40
7.1 Document Upload.....	40
7.2 Document Check-out/Check-In	41
7.3 Document Version	44
7.4 Document Classification.....	46



7.5	Document Download	49
8.	Document Workflow.....	51
9.	Using DAMS from MS Outlook.....	60
9.1	Searching for a File.....	62
9.2	Upload an Email and Attachments	65
9.3	Browse and Upload Files	66
10.	SharePoint Folder	68
11.	Records Management (This is for Records Management Users Only)	71
11.1	File as Record.....	71
12.	User Management (This is only for DAMS System Administrators)	74
12.1	Create a New User	74
12.2	Modify an Existing User.....	75
12.3	Unlock a User.....	76
12.4	Clear User Security Questions	76
12.5	Force User Password Reset	77
13.	Help.....	78
	Appendix A: Key Terms.....	79



1. DAMS Overview

Digital Asset Management Solution (DAMS) is an electronic document, record and content management system. The purpose of DAMS is to convert business documents on paper and other media into a digital format that is searchable, discoverable, and accessible to Ginnie Mae users as the single source of truth.

1.1 Features

DAMS provides the following features and capabilities:

- Role-based security
- Audit trail of documents
- Digital Assets creation, management, classification
- Digital Assets Search - Full/Partial Text, Browse, Auto Suggest (Fuzzy Search)
- Digital Assets Delivery - Import/Export, Download and Workflow
- Content Capture, Multiple Storage Formats, Metadata
- Records Management - Lifecycle Management, Storage, Archiving and Disposition

1.2 Configuration

Figure 1.2.1 below graphically depicts the DAMS application environment, its interfaces, and the various vehicles to access the application. DAMS is hosted on the Ginnie Mae Amazon Web Services (AWS) Cloud platform and is available to users through the secure HUD virtual private network (VPN) connection.

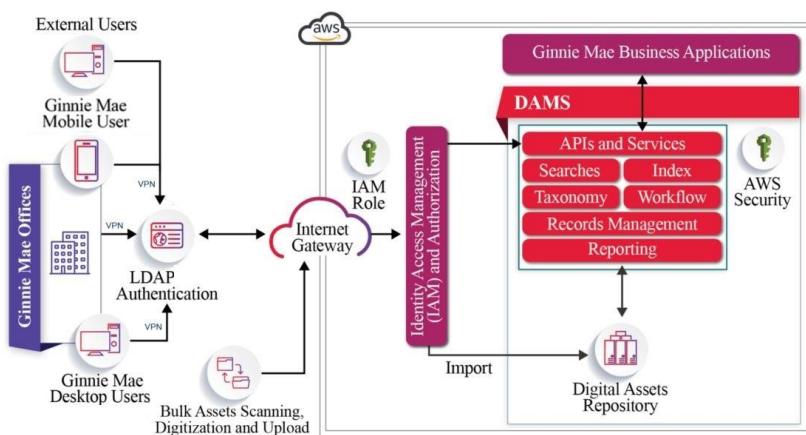


Figure 1.2.1 DAMS Infrastructure



1.3 Data Flows

Figure 1.3.1 below provides a high level description of the flow of content and related information into DAMS:

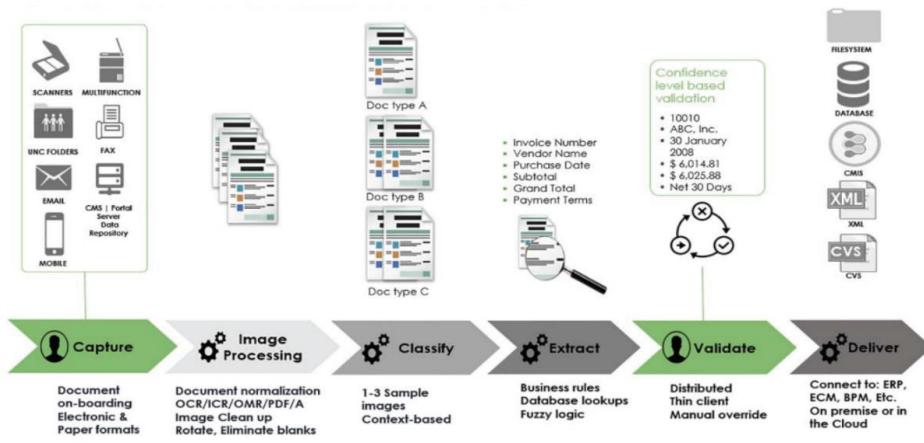


Figure 1.3.1 DAMS Conceptual Content Capture process

Figure 1.3.2 below provides a high-level functional overview of DAMS with current and future interfaces.

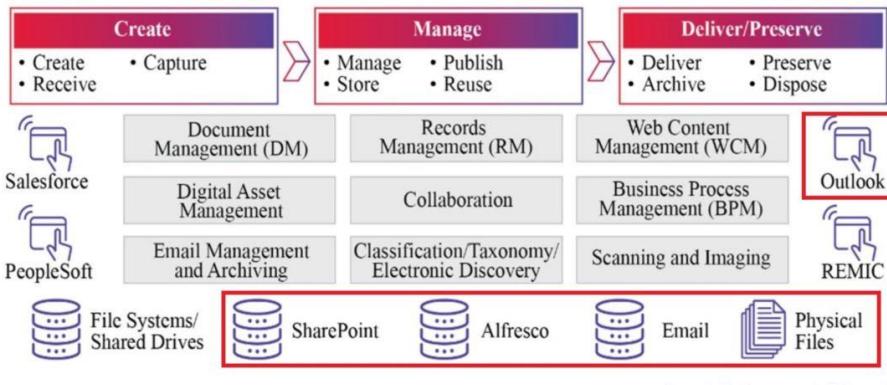


Figure 1.3.2 DAMS Capabilities Overview and Digital Asset Management Process



2. Getting Started

DAMS is a software application accessed through a web browser over a HUD VPN-enabled internet connection. A user opens a login page via the DAMS URL (dams.ginniemae.gov) and then type in their user name and password.

2.1 Software Version

The DAMS current version is Release 1.0.

2.2 DAMS Requirements

Access to the DAMS application requires the following:

- A Ginnie Mae approved device following defined security, memory, processing, operating system, and web browser (Chrome, Internet Explorer, Microsoft Edge) requirements,
- A DAMS account, and
- A HUD VPN account for remote access or on the HUD Network.

Operating system software and browsers must be current to ensure operational and security needs are met.

2.3 Access Information

Access to all content in DAMS is determined based on a user's group/role and their specific Ginnie Mae Office and Division. Figure 2.3.1 below provides a brief description of the security model, followed by a description of each user group/role permission in DAMS.

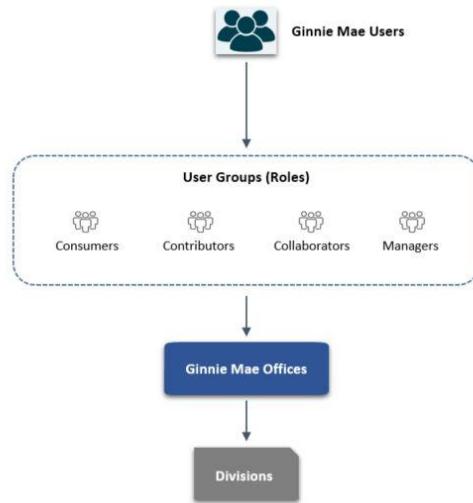


Figure 2.3.1 DAMS User Group Security

- **Office/Division Managers** have full rights to all site content - what they have created themselves and what other site members have created.
- **Office/Division Collaborators** have full rights to the site content that they own; they have rights to edit but not delete content created by other site members.
- **Office/Division Contributors (available but currently not assigned to any users)** have full rights to the site content that they own; they cannot edit or delete content created by other site members.
- **Office/Division Consumers (available but currently not assigned to any users)** have view-only rights in a site: they cannot create their own content.

2.4 Logging On

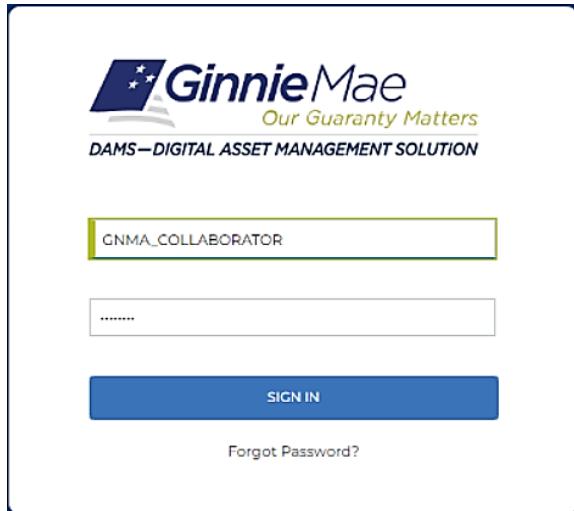
2.4.1 First Time Login

A manager will submit a user access request (UAR) form for an account to be created for a new DAMS user. The user will receive an email providing them with a URL for the DAMS application and instructions for logging in and setting up their account. Figures 2.4.1.1 through 2.4.1.11 below show the steps a user would take to setup their account. The steps involve selecting security questions and providing answers to setup the account to ensure a forgotten password may be reset along with recovery instructions.

Commented [A1]: Need to verify UAR process with Sonya.
• Where should the manager send the request?
• Is there an email address to send it to?
• Is the UAR available online?
• If not, where can users find it?
• Should we also state that a username/ id is a user's Ginnie Mae email?



A user will need to click on the DAMS URL provided and login using the provided username and temporary password.



The image shows the login screen for the Ginnie Mae DAMS (Digital Asset Management Solution). The header features the Ginnie Mae logo with the tagline "Our Guaranty Matters" and the text "DAMS—DIGITAL ASSET MANAGEMENT SOLUTION". Below the header is a yellow-outlined input field containing the text "CNMA_COLLABORATOR". Below this is a standard input field with four dots indicating a password. A blue "SIGN IN" button is positioned below the password field. At the bottom of the screen is a link "Forgot Password?".

Figure 2.4.1.1 Login Screen



A user will need to select three unique Security Questions from the drop downs and provide an answer to each security question. Please see an example below, as seen in Figure 2.4.1.2.

The screenshot shows a web page titled "Ginnie Mae Our Guaranty Matters DAMS – DIGITAL ASSET MANAGEMENT SOLUTION". The main heading is "Password Reset Security Questions". A message states: "Our records indicate you have not set your security questions that you will need to change your password. Please select 3 questions to answer and click the Submit button. You will then be able to login as normal." Below this, there are three sections for security questions:

- SECURITY QUESTION & ANSWER #1**
 - * Pick a question:
What was your best friend's first name in High School?
 - * Answer:
- SECURITY QUESTION & ANSWER #2**
 - * Pick a question:
What was your best friend's first name in High School?
 - * Answer:
- SECURITY QUESTION & ANSWER #3**
 - * Pick a question:
What was your best friend's first name in High School?
 - * Answer:

A large blue "SUBMIT" button is located at the bottom of the form.

Figure 2.4.1.2 Security Questions



A user will need to click on the 'Continue' button:



Figure 2.4.1.3 Security Question Acknowledgement



A user will need to enter their username and click on the 'Submit' button:

A screenshot of a web page titled "Ginnie Mae Our Guaranty Matters DAMS—DIGITAL ASSET MANAGEMENT SOLUTION". The page displays a message: "Your password has expired. You will need to reset your password. A password reset email will be sent to the email address we have on file for this user id." Below the message is a form field labeled "Username:" containing the value "GNMA_COLLABORATOR". At the bottom of the form is a blue "SUBMIT" button.

Figure 2.4.1.4 Specify Username for Reset Email

The following message will be displayed:

A screenshot of a web page titled "Ginnie Mae Our Guaranty Matters DAMS—DIGITAL ASSET MANAGEMENT SOLUTION". The page displays a message: "An email has been sent to the email address we have on file for this username. Please check your email and follow the instructions." Below the message is a blue "RETURN TO LOGIN PAGE" button.

Figure 2.4.1.5 Email Sent Message



A user will need to check their email for the DAMS Password Reset message and click on the link in the email to reset their password as seen in Figure 2.4.1.6:

A screenshot of an email message. The header shows it's from "noreply@dams.uat.ginniemae.gov" at 2:28 PM. Below the header is a "DAMS Password Reset" button and a link to view the message in a web browser. The main content area has a "Ginnie Mae DAMS" logo. The subject line is "Password Reset". The body text says: "We have received your request to reset your password. To reset your password, click or copy this link into your browser: https://dams.uat.ginniemae.gov/alfresco/s/public/pwdReset/getSecurityQuestions/GNMA_COLLABORATOR/email?token=2bXznYIAqd4EwOTqXR7cSmT50L3gDNoc9lTuTqwFF%2B5dmchV6yuT3WGbtQO89D". A note at the bottom states: "This e-mail is being sent to _____ .com because it has been requested by a Digital Asset Management Solution (DAMS) user."

noreply@dams.uat.ginniemae.gov 2:28 PM

DAMS Password Reset

If there are problems with how this message is displayed, click here to view it in a web browser.

Ginnie Mae DAMS

Password Reset

We have received your request to reset your password. To reset your password, click or copy this link into your browser:
https://dams.uat.ginniemae.gov/alfresco/s/public/pwdReset/getSecurityQuestions/GNMA_COLLABORATOR/email?token=2bXznYIAqd4EwOTqXR7cSmT50L3gDNoc9lTuTqwFF%2B5dmchV6yuT3WGbtQO89D

This e-mail is being sent to _____ .com because it has been requested by a Digital Asset Management Solution (DAMS) user.

Figure 2.4.1.6 Password Reset Email



A user will need to answer the security questions previously selected in Figure 2.4.1.2:

The screenshot shows a web page titled "Ginnie Mae" with the tagline "Our Guaranty Matters" and "DAMS—DIGITAL ASSET MANAGEMENT SOLUTION". The main heading is "Password Reset Security Questions". Below it, a instruction says "Please answer the following questions." There are three questions listed, each with an input field for the answer:

- What was your best friend's first name in High School?
• Answer:
- What was the color of your first car?
• Answer:
- What is the name of the road you lived on when you were born?
• Answer:

At the bottom is a blue "SUBMIT" button.

Figure 2.4.1.7 Provide Security Answers



A user will need to create and enter a new password as shown in Figure 2.4.1.8 following the Ginnie Mae password requirements below:

The screenshot shows the 'Password Reset - Step 2 of 2' page of the Ginnie Mae DAMS system. The page header includes the Ginnie Mae logo and the tagline 'Our Guaranty Matters'. Below the header, it says 'DAMS—DIGITAL ASSET MANAGEMENT SOLUTION'. The main content area is titled 'Password Reset - Step 2 of 2' and contains the instruction 'Please enter the new password you wish to use.' There are two input fields: 'New Password' and 'Confirm Password', both preceded by a red asterisk. A large blue 'SUBMIT' button is located at the bottom of the form.

Figure 2.4.1.8 Specify New Password

The Ginnie Mae Password Requirements are as follows:

- Passwords must be at least eight (8) alphanumeric characters in length, and contain the following five (5) character types:
 - Maximum twenty (20) characters in length;
 - Must have at least one (1) English upper case letter (A, B, C, etc.);
 - Must have at least one (1) English lower case letter (a, b, c, etc.) ;
 - Must have at least one (1) Alpha numeric number (0, 1, 2, 3, etc.);
 - Must have at least one (1) special character from the following set: (! @#\$%^&*()_+).
- A user must change their password after 90 days.
- System password history will prevent a user from submitting a password previously used during the last thirteen (13) password changes.

Commented [A2]: Check with Sonya to see if we should include password requirements in the document.



-
- User accounts are locked after three (3) invalid password attempts. The user must contact the appropriate Help Desk or Administrator for identification verification and to unlock the account.
 - User accounts are inactivated after 30 days of inactivity. The user must contact the appropriate Help Desk or Administrator for identification verification and to activate the account.

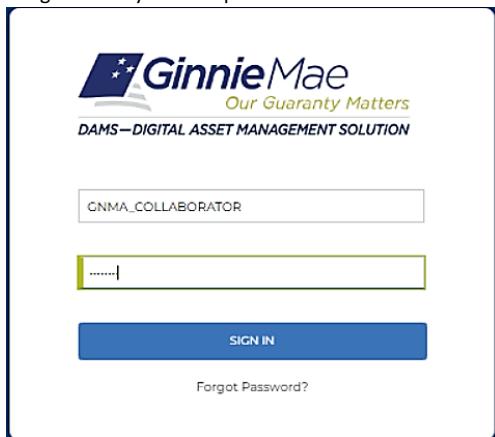
A user will need to click on the '*Return to Login Page*' button in Figure 2.4.1.9 and login to DAMS.



Figure 2.4.1.9 Password Reset Confirmation



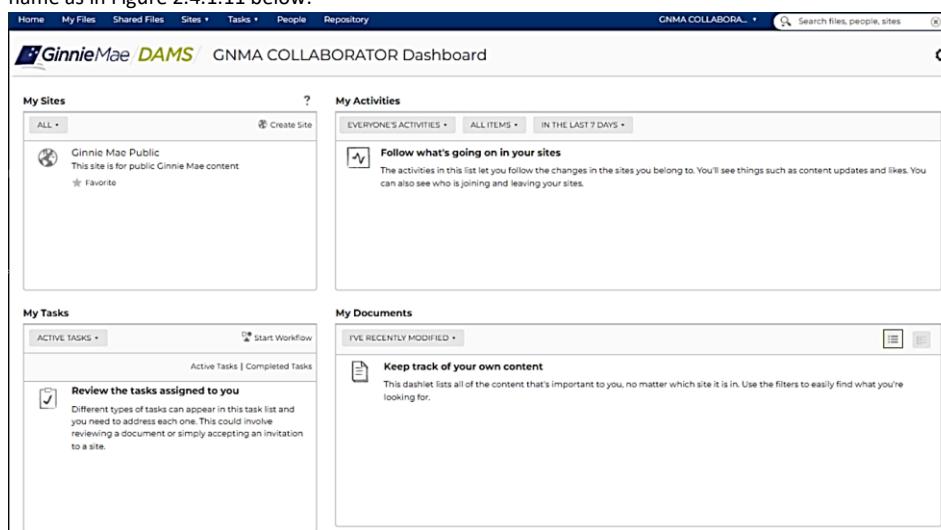
A user will need to login using the newly created password:



The image shows the Ginnie Mae DAMS login screen. It features the Ginnie Mae logo at the top left, followed by the tagline "Our Guaranty Matters" and the text "DAMS—DIGITAL ASSET MANAGEMENT SOLUTION". Below this is a text input field containing "CNMA_COLLABORATOR". Underneath it is a password input field with the placeholder ".....". At the bottom are two buttons: a blue "SIGN IN" button and a smaller "Forgot Password?" link.

Figure 2.4.1.10 Login with New Password

After successfully logging into DAMS, the Ginnie Mae DAMS Dashboard is displayed with the user's name as in Figure 2.4.1.11 below:



The image shows the Ginnie Mae DAMS Dashboard for the user "CNMA COLLABORATOR". The dashboard is divided into several sections: "My Sites" (listing "Ginnie Mae Public" site), "My Activities" (with a "Follow what's going on in your sites" section), "My Tasks" (with a task titled "Review the tasks assigned to you"), and "My Documents" (with a section titled "Keep track of your own content"). The top navigation bar includes links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository, along with a search bar.

Figure 2.4.1.11 Ginnie Mae DAMS Dashboard



2.4.2 Recover from a Forgotten Password

If a password is forgotten, the user will need to click on the ‘Forgot Password?’ link, Figure 2.4.2.1 below, on the login page and follow the subsequent instructions. The user will be prompted to enter their username. An email will be sent to the user, containing a link which will need to be selected, and then follow the given steps that are identical to the initial account setup.

The image shows the Ginnie Mae DAMS login page. It features the Ginnie Mae logo at the top left, followed by the text 'Our Guaranty Matters' and 'DAMS—DIGITAL ASSET MANAGEMENT SOLUTION'. Below the logo are two input fields: 'User Name' and 'Password'. A large blue 'SIGN IN' button is centered between them. At the bottom of the form is a red rectangular button labeled 'Forgot Password?'. The entire form is enclosed in a white box with a thin black border.

Figure 2.4.2.1 Forgot Password Link

2.4.3 Reset/Change Password

A user would need to click on the User Profile drop-down, select the ‘Reset Password’ option, and enter their username to have an Password Reset Link email sent, as shown in Figures 2.4.3.1 to 2.4.3.3 below.

The image shows the GNMA COLLABORATOR Dashboard. At the top, there is a navigation bar with links: Home, My Files, Shared Files, Sites, Tasks, People, and Repository. Below the navigation bar, the header reads 'Ginnie Mae DAMS / GNMA COLLABORATOR Dashboard'. The main content area is divided into sections: 'My Sites' and 'My Activities'. In the top right corner, there is a user profile icon with a dropdown menu. The dropdown menu is open and contains several options: 'User Dashboard', 'My Profile', 'Help', 'Reset Password' (which is highlighted with a red box), 'HOME PAGE', 'Reset Password' (another instance of the link), 'Use Current Page', 'Use My Dashboard', 'Change Password', and 'Logout'. The entire dashboard interface is framed by a light gray border.

Figure 2.4.3.1 Display User Profile Drop-down

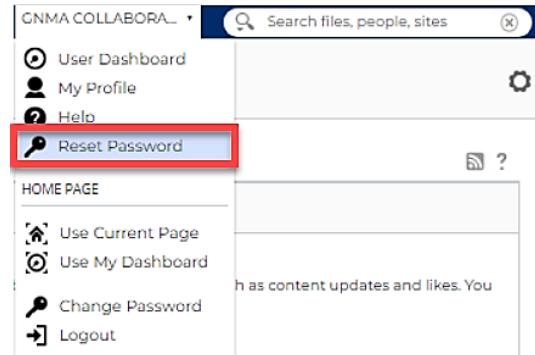


Figure 2.4.3.2 Select 'Reset Password' from Drop-down

A screenshot of a password reset form for "Ginnie Mae DAMS—DIGITAL ASSET MANAGEMENT SOLUTION". The form has a white background with a dark blue header bar. The Ginnie Mae logo is at the top left. The main text reads: "Please enter your username. A password reset email will be sent to the email address we have on file." Below this is a form field with a red asterisk next to the label "Username:" and a placeholder "UserId". At the bottom is a blue "SUBMIT" button.

Figure 2.4.3.3 Enter the Username for the Email with Password Reset Link



2.5 Inactivity Warning and Log Out

To improve DAMS application performance, a user should log out upon completing their work or if leaving the application for more than the session inactivity limit. A user will need to click on the User Profile drop-down, select the '*Logout*' option, as shown in Figure 2.5.1 below.

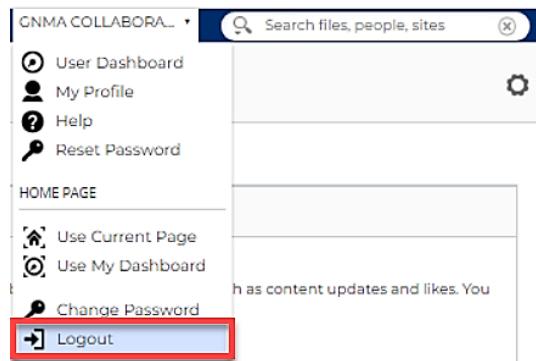


Figure 2.5.1 Logout Link

A user will be logged out automatically if they do not interact with the DAMS application for 15 minutes. Two minutes before being logged out a warning message will appear. A user will need to select the '*Extend*' button, navigate to a different page, or refresh the page to bypass the automatic logout.



An example of the Inactivity Warning is displayed in Figure 2.5.2 below.

The screenshot shows the GinnieMae DAMS GNMA COLLABORATOR Dashboard. At the top, there are navigation links: Home, My Files, Shared Files, Sites, Tasks, People, Repository, and a search bar. Below the navigation is the title "GinnieMae DAMS GNMA COLLABORATOR Dashboard".

The dashboard features several sections:

- My Sites:** Shows a list with one item: "Ginnie Mae Public". A note says "This site is for public Ginnie Mae content" and includes a "Favorite" button.
- My Activities:** A section titled "Follow what's going on in your sites" with a note about tracking changes in sites.
- Inactivity Warning:** A central modal window titled "Inactivity Warning" with the message "Logging out user in 01:57". It has "EXTEND" and "LOGOUT" buttons.
- My Tasks:** A section titled "Review the tasks assigned to you" with a note about different task types and a checkbox labeled "Review the tasks assigned to you".
- Keep track of your own content:** A section with a note about tracking content across sites.

Figure 2.5.2 Inactivity Warning before Automatic Logout



3. DAMS User Dashboard

Upon logging into the DAMS application, the user lands on the Ginnie Mae DAMS Dashboard and is presented with a screen divided into four sections: My Sites, My Activities, My Tasks and My Documents occupying the main body of the page, as shown in Figure 3.1 below. The toolbar across the top of the page provides links to 'Home', 'My Files', 'Shared Files', 'Sites', 'Tasks', 'People', and 'Repository'. It also provides a user account drop-down (user dashboard, my profile, help, password reset, and logout) and a search field. The toolbar allows the user a quick and constant access to certain links from any location in the application. The 'Home' link will take a user to the Homepage. The 'My Files' link will take a user to the location where you can store and manage your files. The 'Shared Files' link is a location where a user can upload content to share and work on with other site members. The 'Sites' link displays the DAMS locations that a user has access, including recent sites. The 'Tasks' link displays the user's tasks and the workflows the user started. The 'People' link allows a user to search for people in the application. The 'Repository' link allows a user to access the data dictionary, shared files, accessible sites, and technical folders in DAMS.

The screenshot shows the Ginnie Mae DAMS dashboard with the following sections:

- My Sites:** Shows a list of sites the user has access to, including "Ginnie Mae Public". A yellow box highlights "Sites User Have Access To".
- My Activities:** Shows recent activity on the user's sites. A yellow box highlights "Recent Activity".
- My Tasks:** Shows active and completed tasks assigned to the user.
- My Documents:** Shows recently modified documents.

A yellow box highlights the "User Name Displayed" in the top right corner of the dashboard area.

Figure 3.1 Home Page Showing Dashboard and Navigation Bar



3.1 My Sites

When a user selects a site (e.g., Ginnie Mae Public) located within the ‘My Sites’ section of the dashboard, the application will navigate to the selected Site Dashboard.

The screenshot shows the GNMA COLLABORATOR Dashboard. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. A search bar is also present. Below the navigation bar, the title 'GinnieMae DAMS GNMA COLLABORATOR Dashboard' is displayed. The main content area is divided into several sections:

- My Sites:** This section displays a list of sites. One item, 'Ginnie Mae Public', is highlighted with a red border. A tooltip for this item states: 'This site is for public Ginnie Mae content' and includes a 'Favorite' link.
- My Activities:** This section shows a summary of recent activities. It includes a heading 'Follow what's going on in your sites' with a description: 'The activities in this list let you follow the changes in the sites you belong to. You'll see things such as content updates and likes. You can also see who is joining and leaving your sites.'
- My Tasks:** This section lists active tasks. It includes a heading 'Review the tasks assigned to you' with a description: 'Different types of tasks can appear in this task list and you need to address each one. This could involve reviewing a document or simply accepting an invitation to a site.'
- My Documents:** This section lists recently modified documents. It includes a heading 'Keep track of your own content' with a description: 'This dashboard lists all of the content that's important to you, no matter which site it is in. Use the filters to easily find what you're looking for.'

Figure 3.1.1 Select and Navigate to a Site Dashboard



Ginnie Mae Public selected site dashboard.

The screenshot shows the Ginnie Mae Public site dashboard. At the top, there's a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. To the right of the navigation is a search bar labeled 'Search files, people, sites'. Below the navigation, the page title is 'GinnieMae DAMS | Ginnie Mae Public' with a 'Public' badge. On the left, there's a sidebar titled 'Site Members' showing a list of the first 100 members, including Adam Smith (Consumer), Adetokunbo Lofinmakin (Consumer), Admin User (Manager), Alton Diaz (Consumer), Amanda Tate (Consumer), Amber Castillo (Consumer), Amber Gaines (Consumer), and Amy Rivera (Consumer). The main content area is divided into two sections: 'Site Content' and 'Site Activities'. The 'Site Content' section has a heading 'Keep track of content changes' with a note about tracking recently modified items. The 'Site Activities' section has a heading 'Follow what's going on in this site' with a note about tracking recent site changes.

Figure 3.1.2 Selected Site Dashboard



A user can select 'Document Library' from the Ginnie Mae Public site dashboard.

The screenshot shows the Ginnie Mae Public site dashboard. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. To the right of the navigation bar is a search bar labeled 'Search files, people, sites'. Below the navigation bar, the page title is 'GinnieMae DAMS Ginnie Mae Public Public'. Underneath the title, there are three main sections: 'Site Members', 'Site Content', and 'Site Activities'. The 'Site Content' section has a red box around the 'Document Library' tab, which is currently selected. The 'Site Members' section lists the first 100 members, including Adam Smith, Adotonkunbo Lofinmakin, Admin User, Alton Diaz, Amanda Tate, Amber Castillo, Amber Gaines, and Amy Rivera. The 'Site Content' section contains a 'Keep track of content changes' box and a 'Follow what's going on in this site' box.

Figure 3.1.3 Selected Document Library Dashboard

A user can select 'All Participant Memos' (APM) folder from the Ginnie Mae Public Document Library dashboard, to view the documents in the APM folder.

The screenshot shows the Ginnie Mae Public Document Library dashboard. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. To the right of the navigation bar is a search bar labeled 'Search files, people, sites'. Below the navigation bar, the page title is 'GinnieMae DAMS Ginnie Mae Public Public'. Underneath the title, there is a 'Documents' section. Within the 'Documents' section, there is a list of items, with the 'All Participant Memos' folder highlighted with a red box. The 'All Participant Memos' folder is described as being modified 5 months ago by Admin User (None). There are also links for 'SELECT', '+ CREATE...', 'UPLOAD', 'SELECTED ITEMS...', 'NAME', and 'OPTIONS'.

Figure 3.1.4 Ginnie Mae Public Document Library Dashboard



3.2 My Tasks

A user can select from the drop-down menu with the ‘My Tasks’ section of the dashboard for selection options of ‘Activity Tasks’, ‘Completed Tasks’, ‘High Priority Tasks’, ‘Tasks Due Today’, ‘Tasks Assigned to Me’, ‘Unassigned (Pooled Tasks)’, or ‘Overdue Tasks’.

The screenshot shows the 'My Tasks' section of the dashboard. On the left, there's a sidebar with 'My Sites' and 'My Tasks'. The 'My Tasks' section has a dropdown menu titled 'ACTIVE TASKS' with the following options: Active Tasks (selected), Completed Tasks, High Priority Tasks, Tasks Due Today, Tasks Assigned to Me, Unassigned (Pooled Tasks), and Overdue Tasks. A red box highlights this dropdown menu. To the right of the tasks is a 'My Activities' section with a dropdown menu titled 'EVERYONE'S ACTIVITIES' with options: My activities (selected), Everyone else's activities, Everyone's activities, and I'm following. Below these sections are 'My Documents' and 'My Activities' sections.

Figure 3.2.1 My Tasks Drop-down

3.3 My Activities

A user can select specific user activity from the ‘Everyone’s Activities’ drop-down menu within the ‘My Activities’ section of the home dashboard. The selection options include ‘My activities’, ‘Everyone else’s activities’, ‘Everyone’s Activities’, or ‘I’m following’.

The screenshot shows the 'My Activities' section of the dashboard. It has a dropdown menu titled 'EVERYONE'S ACTIVITIES' with the following options: My activities (selected), Everyone else's activities, Everyone's activities, and I'm following. A red box highlights this dropdown menu. To the left is the 'My Tasks' section, and to the right are 'My Documents' and 'My Activities' sections.

Figure 3.3.1 My Activities/Everyone’s Activities Drop-down



A user can select the content type from the 'All Items' drop-down menu with the 'My Activities' section of the dashboard for selection options of 'all items', 'comments', 'content', or 'memberships'.

The screenshot shows the 'My Activities' section of the GinnieMae DAMS GNMA COLLABORATOR Dashboard. On the left, there's a 'My Sites' panel showing one site: 'Ginnie Mae Public'. The main area has a heading 'My Activities' with a sub-section 'EVERYONE'S ACTIVITIES'. Below it is a 'Follow what's going on in you' section. A red box highlights the 'ALL ITEMS' dropdown menu, which is open to show four options: 'all items', 'comments', 'content', and 'memberships'.

Figure 3.3.2 My Activities/All Items Drop-down

A user can select the time frame from the 'In the Last 7 Days' drop-down menu with the 'My Activities' section of the dashboard for selection options of 'today', 'in the last 7 days', 'in the last 14 days', or 'in the last 28 days'.

The screenshot shows the 'My Activities' section of the GinnieMae DAMS GNMA COLLABORATOR Dashboard. The 'IN THE LAST 7 DAYS' dropdown menu is highlighted with a red box and is open, showing four options: 'today', 'in the last 7 days' (which is selected and highlighted in blue), 'in the last 14 days', and 'in the last 28 days'.

Figure 3.3.3 My Activities/In the Last 7 Days Drop-down



3.4 My Documents

A user can select the types of documents from the 'I've Recently Modified' drop-down menu within the 'My Documents' section of the home dashboard. The selection options include 'I've Recently Modified', 'I'm Editing', or 'My Favorites'.

The screenshot shows the GinnieMae DAMS GNMA COLLABORATOR Dashboard. At the top, there's a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. A search bar is also present. Below the navigation, there are sections for 'My Sites' (listing 'Ginnie Mae Public' site), 'My Activities' (with a 'Follow what's going on in your sites' card), 'My Tasks' (listing 'Active Tasks' and 'Completed Tasks'), and 'My Documents'. The 'My Documents' section has a dropdown menu titled 'I'VE RECENTLY MODIFIED' with three options: 'I've Recently Modified' (which is selected and highlighted with a red box), 'I'm Editing', and 'My Favorites'. The rest of the page contains placeholder text and cards for other features like 'Follow what's going on in your sites' and 'My Recent Activity'.

Figure 3.4.1 My Documents Drop-down

4. Search for a Document

4.1 Browse and Auto Suggest

A user will need to enter the text for a simple search for documents in the Search field located on the right-side of the bar across the top of the page. Figure 2.5.2.1 below, contains a simple text search example, where a user will enter '*apm*' in the Search field and select one of the documents from the returned list. The application Fuzzy Search will auto-suggest documents with the entered text search value.

4.2 Full and Partial Text

A user will need to enter the text for a simple search for documents in the Search field located on the right-side of the bar across the top of the page.



The example below, Figure 4.2.1 below, contains a simple search for the text, where a user will enter 'apm' in the Search field and select one of the documents from the returned list. The application Fuzzy Search will auto-suggest documents with the entered 'text value'. This will include a full or partial text search of documents.

The screenshot shows the Ginnie Mae DAMS GNMA COLLABORATOR Dashboard. At the top, there is a navigation bar with links: Home, My Files, Shared Files, Sites, Tasks, People, and Repository. A search bar on the right contains the text 'apm'. Below the navigation, there are several sections:

- My Sites**: Shows a site named "Ginnie Mae Public" which is described as "This site is for public Ginnie Mae content".
- My Activities**: A section titled "Follow what's going on in your sites" showing recent activities. One activity is highlighted with a red box: "APM_21-08.pdf" by "Ginnie Mae Public" (22 days ago) | OIPM_MP_MANAGER.
- My Tasks**: A section titled "Review the tasks assigned to you" showing a task: "Review the tasks assigned to you" (Active Tasks).
- My Documents**: A section titled "Keep track of your own content" showing a message: "This dashboard lists all of the content that's important to you, no matter which site it is in. Use the filters to easily find what you're looking for."
- Documents**: A sidebar listing recent documents. One document is highlighted with a red box: "APM_21-07.pdf" by "Ginnie Mae Public" (22 days ago) | OIPM_MP_MANAGER.

Figure 4.2.1 Enter Search Text and Select from Results



The user selected document will be displayed.

The screenshot shows a web-based document viewer for a PDF titled "APM_21-07.pdf". The document is dated November 15, 2021, and is a Memorandum from Michael Drury, Acting Executive Vice President, to All Participants in Ginnie Mae's Loan Modification Program. It discusses the use of electronic signatures for loan modifications. The document includes several bullet points detailing the process, such as "All Participants in Ginnie Mae's Loan Modification Program will now be able to use electronic signatures for loan modifications" and "Participants will be able to use electronic signatures for loan modifications at any time, provided they have been previously authorized by their servicer or originator". The document also mentions the use of remote online notarization and provides instructions for using electronic signatures. On the right side of the screen, there is a "Document Actions" panel with options like "View in Browser", "Copy to...", "Start Workflow", and "Email as link". Below that is a "Share" section with a link to the document. At the bottom, there is a "Properties" section showing the file name as "APM_21-07.pdf", title as "TEMP All Participant Memorandum 18.07.01", and author as "Angel R. Hernandez".

Figure 4.2.2 Selected Document Displayed



A user will need to click on the *magnifying glass* icon to search for specific text throughout the document.

The screenshot shows a document titled "APM_21-07.pdf" from the "Ginnie Mae Public" site. The document is a memorandum dated November 15, 2021, addressed to All Participants in Ginnie Mae View Program. It discusses the COVID-19 pandemic and the ability to use electronic signatures for loan modification agreements. The document includes several bullet points and a signature section at the bottom. On the right side of the screen, there is a "Document Actions" panel with options like "View In Browser", "Copy to...", "Start Workflow", and "Email as link". Below that is a "Share" section with a link to the document. At the bottom is a "Properties" section showing details like the title, author, and mime type. The magnifying glass icon is located in the top right corner of the main document viewer area.

Figure 4.2.3 Magnifying Glass to Search Document



A user will need to enter specific text in the search box and then press the arrow icons to view each match.

The screenshot shows a SharePoint document library interface. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. A search bar is located at the top right. Below the navigation bar, the title "GinnieMae DAMS Ginnie Mae Public" is displayed, along with a "Public" badge. The main content area shows a PDF document titled "APM_21-07.pdf". The PDF contains a memorandum from November 15, 2021, addressed to all participants in Ginnie Mae Programs. It discusses the use of electronic signatures and remote online notarization for loan modifications. A red box highlights the search bar and the search icon in the document viewer toolbar. To the right of the document, there is a "Document Actions" panel with options like View in Browser, Copy to, Start Workflow, and Email as link. Below that is a "Share" section with a link to share the page. At the bottom is a "Properties" panel showing details about the document, such as its name, title, author, and creation date.

Figure 4.2.4 Find First Matching Text in Document



A user would need to select the right arrow to find the first match and then continue selecting the right arrow to view each occurrence throughout the document of the specified search text, as seen in Figure 4.2.5.

The screenshot shows a SharePoint interface with the following details:

- Header:** Home, My Files, Shared Files, Sites, Tasks, People, Repository, CNMA COLLABORATE, Search files, people, sites.
- Breadcrumb:** Documents > DB Audits Testing > OIPM_MF_MANAGER
- Title:** APM_21-07.pdf
- Search Bar:** Search term: APM 21-07
- Document Actions:** View In Browser, Copy to..., Start Workflow, Email as link.
- Share:** Copy this link to share the current page: <https://damsuat.ginniemae.gov/share/page/site/ginnie-mae-public>
- Properties:** Name: APM_21-07.pdf, Title: TEMP All Participant Memorandum 18.07.01, Description: (None), Author: Angel R. Hernandez, Categories: (None), Mimetype: Adobe PDF, Size: 207 KB, Document, Created Date: Mon 25 Jul 2022, Creator: OIPM_MF_MANAGER.

Figure 4.2.5 First Match Displayed



4.3 Advanced

An advanced search allows a user to enter multiple search criteria in a more targeted search. For an advanced search, a user would need to select the magnifying icon in the Search field located on the right-side of the bar across the top of the page, then select the 'Advanced Search' option from dropdown.

The screenshot shows the GinnieMae DAMS GNMA COLLABORATOR Dashboard. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. To the right of the navigation bar is a search bar with the placeholder "Search files, people, sites" and a magnifying glass icon. Below the search bar is a red rectangular box highlighting the "Advanced Search..." link. The main content area is divided into several sections: "My Sites" (listing "Ginnie Mae Public" site), "My Activities" (listing an activity from "Today"), "My Tasks" (listing a task titled "Review the tasks assigned to you"), and "My Documents" (listing a document titled "Keep track of your own content").

Figure 4.3.1 Invoke Advanced Search



The user will need to review the available Advanced Search fields in Figure 4.3.2 to determine which field(s) they would like to search.

A screenshot of the GinnieMae DAMS Advanced Search interface. The page has a dark header with navigation links: Home, My Files, Shared Files, Sites, Tasks, People, Repository, and a search bar labeled "Search files, people, sites". Below the header is the title "GinnieMae DAMS Advanced Search". The main area contains a form with the following fields:

- Look For: A dropdown menu set to "CONTENT".
- Keywords: A text input field containing the letter "I".
- SEARCH: A button with a magnifying glass icon.
- Name: A text input field.
- Title: A text input field.
- Description: A text input field.
- Mimetype: A dropdown menu set to "Unknown".
- Modified Date: A date range selector with "From" and "To" fields, both set to "1/1/2014".
- Modifier: A text input field.
- Document Source: A dropdown menu.
- Source Document ID: A text input field.
- Version Number: A text input field.
- SEARCH: A button with a magnifying glass icon.

Figure 4.3.2 Advanced Search Fields



A user would need to select the ‘Look for: Content’ drop-down field to view the document search types. Please use the down arrow on the keyboard to advance through the possible options and then press the ‘Enter’ key to select the content type to search for, as shown in Figure 4.3.3 below.

The screenshot shows the GinnieMae DAMS Advanced Search interface. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. On the right side of the header is a search bar labeled "Search files, people, sites". Below the header, the main search area has a dropdown menu titled "Look for:" with "CONTENT" selected. To the right of this dropdown is a search button with a magnifying glass icon. The search results pane on the right is currently empty. The left side of the screen displays a list of search filters under the heading "Content". One filter, "All Participant Memos", is highlighted with a blue background and white text. Other filters listed include "Folders", "Title", "OIPM Documents (All Types)", "OIPM Contract Documents", "OIPM Defaulted Issuers Documents", "OIPM Electronic Contract Documents", "OIPM Electronic Transfer Contract Documents", "OIPM Enterprise Correspondence", "OIPM Formal Request", "OIPM Historical Contract Documents", "OIPM Issuer Application Documents", and "Version". Each filter is preceded by a small checkbox and a descriptive text label.

Figure 4.3.3 Content Filter Options



A user would need to enter text in at least one of the standard or custom search fields, and then click on the 'Search' button on the right side of the form, as shown in Figure 4.3.4 below.

The screenshot shows the GinnieMae DAMS Advanced Search interface. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. To the right of the navigation is a search bar labeled "Search files, people, sites". Below the navigation, the title "GinnieMae DAMS Advanced Search" is displayed. The search form contains several input fields:

- "Look for:" dropdown menu with the value "ALL PARTICIPANT MEMOS" highlighted by a red box.
- "Keywords:" text input field.
- "Name:" text input field.
- "Title:" text input field.
- "Description:" text input field.
- "AFH Number:" text input field.
- "AFH Year:" dropdown menu with the value "2014" highlighted by a red box.
- "Source Document ID:" text input field.
- "Version Number:" text input field.

At the bottom right of the search form is a "SEARCH" button, which is also highlighted with a red box.

Figure 4.3.4 Populate Search Field Values



A user would need to select a document from the list of returned search results in order to view the document, as shown in Figure 4.3.5 below.

The screenshot shows a search results page for the Ginnie Mae DAMS system. The search term is "Ginnie Mae DAMS". The results list seven PDF files, each with a preview thumbnail, file name, size, and date modified. The results are filtered by "All Participant Memos".

File Name	Size	Date Modified
CMD042181.pdf	991 KB	1999-09-11
CMD042185.pdf	995 KB	1999-09-11
CMD042189.pdf	998 KB	1999-09-11
CMD042193.pdf	998 KB	1999-09-11
CMD042197.pdf	998 KB	1999-09-11
CMD042201.pdf	999 KB	1999-09-11

Figure 4.3.5 View and Select from Search Results



5. Viewing a Document

To view a document, a user would need to select a document from the search results or from a division folder.

The screenshot shows a search results page for 'Ginnie Mae DAMS / Search'. The search bar contains 'Search in: All Sites'. The results list several PDF files:

- CMD042181.pdf** (99.1 - 1999) [link]
Modified 10 months ago by Admin User| Size30 KB| Site: Ginnie Mae Public
In folder: (All Participant Memos)
- CMD042185.pdf (99.5 - 1999) [link]
Modified 10 months ago by Admin User| Size263 KB| Site: Ginnie Mae Public
In folder: (All Participant Memos)
- CMD042189.pdf (99.9 - 1999) [link]
Modified 10 months ago by Admin User| Size495 KB| Site: Ginnie Mae Public
In folder: (All Participant Memos)
- CMD042193.pdf (99.9 - 1999) [link]
Modified 10 months ago by Admin User| Size2 MB| Site: Ginnie Mae Public
In folder: (All Participant Memos)
- CMD042197.pdf (99.9 - 1999) [link]
Modified 10 months ago by Admin User| Size854 KB| Site: Ginnie Mae Public
In folder: (All Participant Memos)
- CMD042201.pdf (99.22 - 1999) [link]
Modified 10 months ago by Admin User| Size309 KB| Site: Ginnie Mae Public
In folder: (All Participant Memos)

Figure 5.1 Select Document from Search Results



5.1.1 Document Menus

Once a user selects and opens a document, the **Document Actions** menu is viewable on the right panel menu, as shown in Figure 5.2 below. Document Actions options include 'View in Browser', 'Edit Offline', 'Upload New Version', 'Edit Properties', 'Copy to', 'Start Workflow', 'Manage Aspects', 'Change Type', 'Email as link', and 'Add to Hold'. Depending on the rights of the user, the options listed under the Document Actions menu will be different.

The screenshot shows a web-based document viewer for a PDF titled 'GMD042181.pdf'. The document content is a memorandum dated January 21, 1999, from George S. Anderson, Executive Vice President of The Government National Mortgage Association, to all participants in the Ginnie Mae Mortgage-Backed Securities Program. The memo announces a temporary extension in the final certification deadline for pools issued from January 1, 1998, to June 1, 1998, due to accelerated volume of refinancing. The 'Document Actions' menu, located on the right side of the page, is highlighted with a red box. This menu includes options such as View In Browser, Edit Offline, Upload New Version, Edit Properties, Copy to, Start Workflow, Manage Aspects, Change Type, Email as link, Add to Hold, and Share. Below the menu, there is a link to copy the current page's URL.

Figure 5.1.1 View Document and Document Actions Menu



Under the Document Actions on the right panel menu, the Share, Properties, Workflows, and Version History menus are also available. The Share menu displays the link for the current document. The Properties menu displays information for the document. These include Name, Title, Description, Mime type, Author, Creator, Created Date, Modifier, Modified Date, Categories, and any custom metadata fields. Custom metadata fields for APM's include APM Number and APM Year.

FROM: George S. Anderson, Executive Vice President
SUBJECT: Final Certification Deadlines

Ginnie Mae announces a temporary extension in the final certification deadline of Mortgage-Backed Securities pools. This decision has been made due to the accelerated volume of refinancing activity of this transaction, and to alleviate the undue hardship experienced by issuers and custodians in their efforts to final certify pools.

The final certification due dates for pools with issue dates of January 1, 1998, through June 1, 1998, will be extended to July 1, 1999. For example, for pools issued January 1, 1998, the new final certification due date will be July 1, 1999. Similarly, for those pools issued

Comments
ADD COMMENT
No comments

▼ Share
Copy this link to share the current page
<https://item.usginninemae.gov/shareablelink/mme-mae-public/document>

▼ Properties
Name: GMDD42181.pdf
Title: 99-1999
Description: (None)
Mimetype: application/pdf
Author: (None)
Creator: admin
Created Date: Tue 12 Oct 2021 08:41:20
Modifier: admin
Modified Date: Tue 12 Oct 2021 08:41:20
Categories: (None)

All Participant Metadata Properties
APM Number: 99-
APM Year: 1999

▼ Workflows
This document is not part of any workflows.

▼ Version History
Latest Version
GMDD42181.pdf
Admin User 10 months ago
(No Comment)

Older Versions
This document has no previous versions

Figure 5.1.2 Share, Properties, Workflows, and Version History Menus



6. Create a Folder

For this example, the Ginnie Mae Public site is selected, the ‘*Document Library*’ is selected, and then the ‘*All Participant Memos*’ folder is selected. From the ‘*All Participant Memos*’ folder, select the ‘*Create*’ button, select the ‘*Folder*’ option, then populate the details of the new folder and click the ‘*Save*’ button. As shown below in Figures 6.1 through 6.4.

The screenshot shows a SharePoint 'Document Library' page titled 'Ginnie Mae Public'. The left navigation bar includes 'Documents', 'Library' (with 'All Participant Memos' selected), and 'Categories'. The main area displays a list of PDF files under the 'All Participant Memos' folder. A red box highlights the '+ CREATE+' button at the top left of the list. The list includes:

- GMD04733.pdf (97-58 - 1997) - Modified 10 months ago by Admin User 25 kB
- GMD04739.pdf (CNA Compliance Testing Policies and Procedures Manual - Volume 1 of 2 - 1995) - Modified 10 months ago by Admin User 20 MB
- GMD04742.pdf (971) - Modified 10 months ago by Admin User 7 MB
- GMD04743.pdf (1972) - Modified 10 months ago by Admin User 5 MB
- GMD04744.pdf (973) - Modified 10 months ago by Admin User 1MB
- GMD04745.pdf (974) - Modified 10 months ago by Admin User 3 MB
- GMD04746.pdf (975) - Modified 10 months ago by Admin User 5 MB

Each item has options to 'Edit', 'Delete', 'Comment', and 'Share'.

Figure 6.1 Select Create Button



Sites + Tasks + People Repository

Ginnie Mae DAMS Ginnie Mae Public Public

Site Dashboard Document Library Site Members

NAME OPTIONS

CREATE... UPLOAD SELECT ITEMS

Documents

- All Documents
- I'm Editing
- Others are Editing
- Recently Modified
- Recently Added
- My Favorites

Library

- Documents
 - All Participant Member
 - DB Audit Testing
 - SharePoint Documents

Categories

- Category Root

SELECT

+ CREATE... UPLOAD SELECT ITEMS

Folder

- Plain Text...
- HTML...
- XML...
- Google Docs™ Document...
- Google Docs™ Spreadsheet...
- Google Docs™ Presentation...

Create document from template

Create folder from template

Comments

File

Plain Text...

HTML...

XML...

Google Docs™ Document...

Google Docs™ Spreadsheet...

Google Docs™ Presentation...

Create document from template

Create folder from template

Comments

File

GMD041742.pdf (971)

Modified 10 months ago by Admin User (None)

- #111

★ Favorite | ↗ Like 0 | ⚡ Comment < Share

GMD041742.pdf (972)

Modified 10 months ago by Admin User (None)

- #112

★ Favorite | ↗ Like 0 | ⚡ Comment < Share

GMD041744.pdf (973)

Modified 10 months ago by Admin User (None)

- #113

★ Favorite | ↗ Like 0 | ⚡ Comment < Share

GMD041745.pdf (974)

Modified 10 months ago by Admin User (None)

- #114

★ Favorite | ↗ Like 0 | ⚡ Comment < Share

GMD041746.pdf (975)

Modified 10 months ago by Admin User (None)

- #115

★ Favorite | ↗ Like 0 | ⚡ Comment < Share

Figure 6.2 Select Folder Option

New Folder

New Folder Details

Required Fields

Name: Test Folder

Title: Test Folder

Description: Test Folder

SAVE CANCEL

Figure 6.3 New Folder Details



The screenshot shows a SharePoint document library interface. At the top, there's a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. The main title is "Ginnie Mae DAMS" and the page title is "Ginnie Mae Public". On the left, a navigation pane shows sections for Documents, Library, and Categories. The main content area displays a list of items under "Documents". A new item, "Test Folder", is highlighted with a red box. It was created just now by "GNMA COLLABORATOR". Below the list are standard SharePoint item controls: "Edit", "Like", and "Comment".

Figure 6.4 Created New Folder

7. Document Management

7.1 Document Upload

A user may upload files from their desktop to DAMS.

A user would need to select the 'Upload' button, click the 'Select Files to Upload' button, then choose a file from the appropriate folder on their desktop and click the 'Open' button, as shown in Figures 7.1.1 and 7.1.2.

This screenshot shows the same SharePoint document library interface as Figure 6.4. The "UPLOAD" button in the top toolbar is highlighted with a red box. Below it, there's a large dashed rectangular area with instructions: "Drag and drop to upload files!" followed by two smaller boxes: one for dragging files directly onto the area and another for dragging files onto a folder icon. Below these are two more options: "Upload files" and "Create a folder". The left sidebar shows the navigation structure: Documents, Library, and Categories.

Figure 7.1.1 Upload File

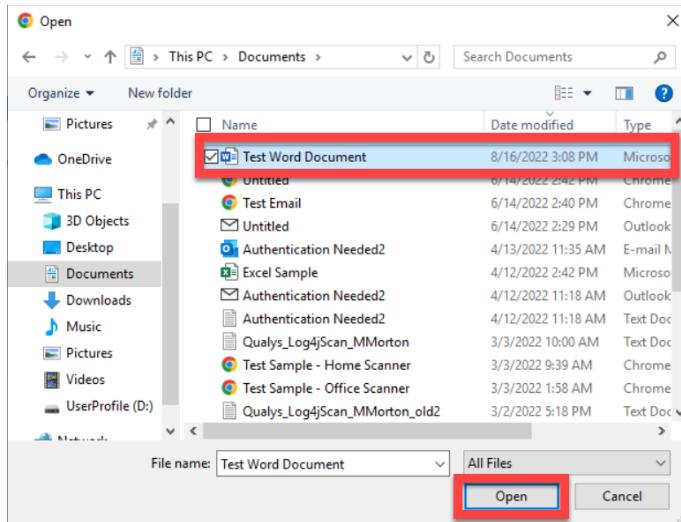


Figure 7.1.2 Select Files to Upload

7.2 Document Check-out/Check-In

After a user has uploaded a file into DAMS, a user would have the ability to check-out and edit a document offline. A user would need to select a digital asset file, then select the '*Edit Offline*' option under Document Actions to check-out a document, as shown in Figures 7.2.1 and 7.2.2.

Figure 7.2.1 Select File



This is a test Word document.

1. This is test line 1.
2. This is test line 2.
3. This is test line 3.

Figure 7.2.2 Edit Offline

The document will be locked while the user is editing the document offline, as shown in Figure 7.2.3.

This document is locked by you for offline editing.

Figure 7.2.3 Document Locked

After editing offline and saving updates, the user would need to select the '*Upload New Version*' option under Document Actions of the original file, as shown in Figures 7.2.4 and 7.2.5. Please see the next section 7.3 Document Version, for detailed instructions on uploading a new version.

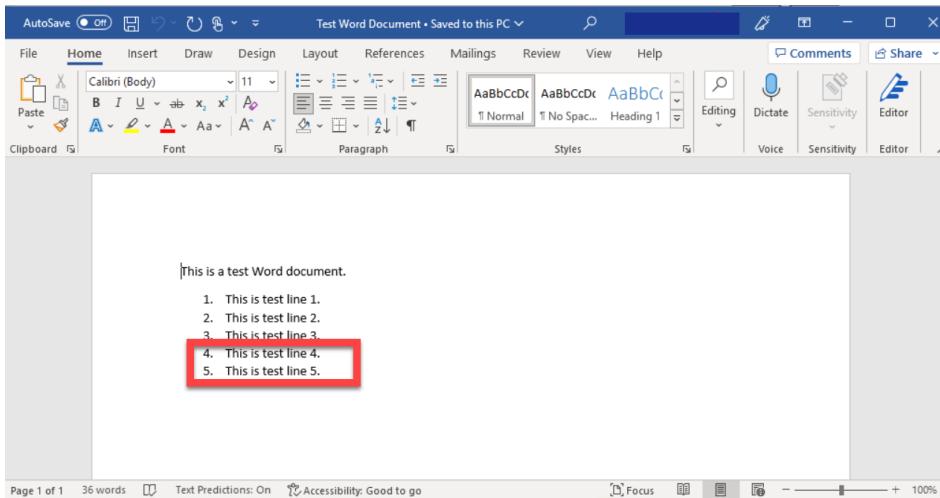


Figure 7.2.4 Update Document File

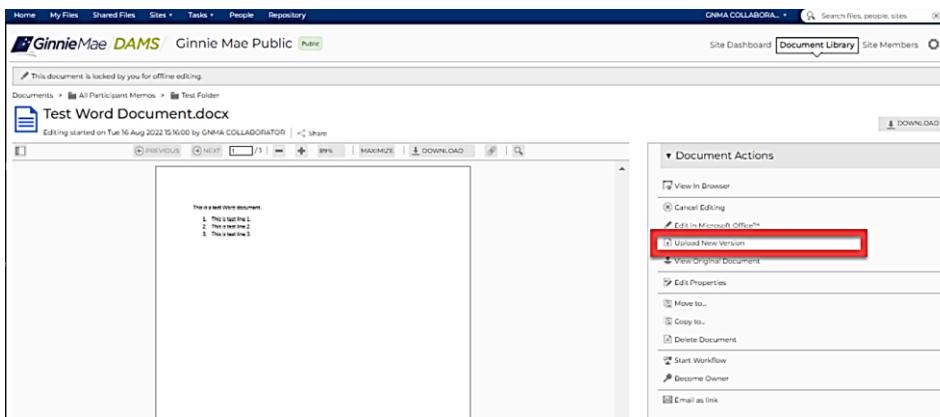


Figure 7.2.5 Upload New Version



7.3 Document Version

To create another version of a document, a user would need to open the original document and select the ‘Upload New Version’ option under Document Actions. Then fill out the ‘Update File’ pop-up box, specifically click on the ‘Select Files to Upload’ button, select the updated file to replace the current file, populate the New Version Information section, and click on the ‘Upload’ button, as shown in Figures 7.3.1 through 7.3.3. The document will be unlocked when a new version is uploaded.

The screenshot shows a SharePoint 'Document Library' interface. On the right, a 'Document Actions' menu is open, listing various options like 'View in Browser', 'Edit in Microsoft Office', and 'Upload New Version'. The 'Upload New Version' option is highlighted with a red box. On the left, there's a preview pane showing a sample Word document with some text and a list of three items.

Figure 7.2.1 Upload New Version

The screenshot shows the 'Update File' dialog box. It has two main sections: 'Current File' and 'New File'. Under 'Current File', there are details about the existing document. Under 'New File', there's a preview icon. Below these, the 'New Version Information' section is highlighted with a red box. It contains a radio button for 'minor changes (1.1)' and 'major changes (2.0)', with 'major changes' selected. A 'Comments' field contains the text 'Updated document with additional information.' At the bottom, there are 'UPLOAD' and 'CANCEL' buttons.

Figure 7.2.2 Update File



Home My Files Shared Files Sites Tasks People Repository CNMA COLLABORATOR Search files, people, sites

GinnieMae DAMS / Ginnie Mae Public Public

Documents > All Participant Memos > Test Folder

Test Word Document.docx 2.0 Modified by CNMA COLLABORATOR on 09/08/2022 11:47:47 Like 0 Comment Share DOWNLOAD

This is a test word document.
1. This is section 1.
2. This is section 2.
3. This is section 3.
4. This is section 4.

PREVIOUS NEXT 1/1 60% MAXIMIZE DOWNLOAD

▼ Document Actions

- View In Browser
- Edit in Microsoft Office™
- Edit Offline
- Upload New Version
- Edit Properties
- Move to...
- Copy to...
- Delete Document
- Edit in Google Docs™
- Start Workflow
- Manage Permissions
- Become Owner
- Manage Aspects
- Change Type
- Email as link
- Add to Hold

Figure 7.2.3 Uploaded New Version



7.4 Document Classification

To classify a document, a user would need to select a document and choose the '*Classify*' option under Document Actions.

The screenshot shows a SharePoint-like interface for 'GinnieMae DAMS OIPM'. The top navigation bar includes 'Home', 'My Files', 'Shared Files', 'Sites', 'Tasks', 'People', and 'Repository'. The current page is 'Contract Documents > OIPM Contract Documents (Specific to a group in CNMA reviewing the various contracts)'. A document titled 'Chapter_03.pdf' is displayed. On the right side, a 'Document Actions' menu is open, listing options like 'View In Browser', 'Edit Offline', 'Upload New Version', 'Edit Properties', 'Move to...', 'Copy to...', 'Delete Document', 'Start Workflow', 'Manage Permissions', 'Become Owner', 'Manage Aspects', 'Change Type', 'Email as Link', 'File as Record', 'File Versions as Record', 'Auto-Declare Options', and 'Add to Hold'. The 'Classify' option is highlighted with a red box.

Figure 7.4.1 Classify Document

The user would need to populate the required Security Classification fields, including '*Classification*', '*Classified By*', and '*Classification Reasons*'. Classification options include 'Top Secret', 'Secret', 'Confidential', and 'Unclassified'. A user may also populate optional fields such as '*Classification Agency*' under Security Classification or '*Custom Classifications*' under Security Groups. Custom Classification options include 'Essential to Business Continuity', 'Private', and 'Privileged'.



Then the user would need to select the '*Classify*' button to attach classification label(s) to the document. As shown in Figures 7.4.2 and 7.4.3.

The screenshot shows the 'Classify Content' page in the Ginnie Mae DAMS system. At the top, there's a navigation bar with links like Home, My Files, Shared Files, Site & Tools, People, and Repository. Below the navigation is a breadcrumb trail: Document Library > MultiFamily > Contract Documents > QPM-Contract Documents (Specific to a group in CMHA reviewing the various contracts). A file named 'Chapter 23.pdf' is selected. The main area contains fields for Source Name, Originating Organization, and Publication Date. Under 'Security Classification', there are tabs for Top Secret, Secret, Confidential, and Unclassified, with 'Confidential' selected. It also shows 'Classified By' (Carter), 'Classification Agency' (GPM), and 'Classification Reasons'. A 'Downgrade Schedule' section includes fields for 'Downgrade Date' and 'Event'. At the bottom, there's a 'Security Create' section with 'Custom Classification' and buttons for 'Create' and 'Cancel'.

Figure 7.4.2 Classify Document



Home My files Shared files Sites Tasks People Repository Jacqueline Carter Search files, people, sites

GinnieMae DAMS OIPM Moderated Site Dashboard Document Library Site Members

Chapter_03.pdf 10 Modified by Jacqueline Carter on Tue 16 Aug 2022 18:00:40 | * Favorite | Like 0 | Comment DOWNLOAD

CONFIDENTIAL PRIVILEGED

Chapter 03.pdf

View In Browser Edit Offline Upload New Version

Edit Properties Move to... Copy to... Delete Document

Start Workflow Manage Permissions Become Owner

Manage Aspects Change Type

Email as link File Version as Record

Auto-Declare Options Add to Home Edit Classification

Figure 7.4.3 Document Classification Labels



7.5 Document Download

To download a document, a user would need to open the document and select the ‘Download’ button above Document Actions or select the ‘Download’ button from the document toolbar, as shown in Figure 7.5.1.

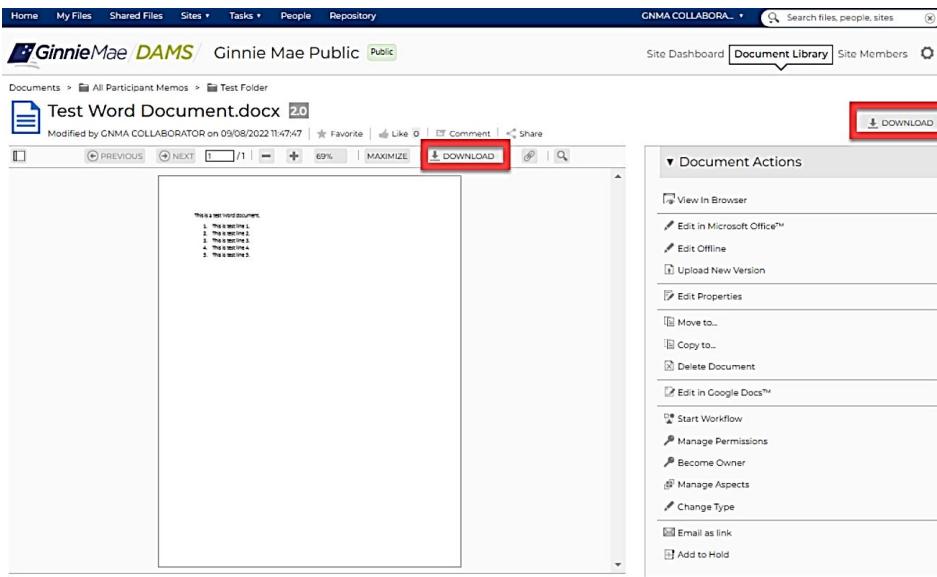


Figure 7.5.1 Document Download



A user may also select the checkbox for multiple files from a folder, click on the 'Selected Items' button, and then select the 'Download as Zip' option. Open File Explorer, select the Downloads folder, look for the latest zip file 'Archive' created, and double click the file. The selected files from DAMS will be downloaded and saved in the zip file. As shown in Figures 7.5.2 and 7.5.3.

The screenshot shows the Ginnie Mae DAMS Document Library interface. A red box highlights the 'Selected Items' dropdown menu, which includes an option to 'Download as Zip'. Another red box highlights two specific files: 'GMD041733.pdf' and 'GMD041739.pdf', both of which have checkboxes checked, indicating they are selected. The 'GMD041733.pdf' file is described as a 'GMMA Compliance Testing Policies and Procedures Manual - Volume 1 of 2 - 1995' document. The 'GMD041739.pdf' file is described as a 'GMMA Compliance Testing Policies and Procedures Manual - Volume 2 of 2 - 1995' document.

Figure 7.5.2 Selected Items and Download as Zip

The screenshot shows a Windows File Explorer window. The address bar shows the path: 'This PC > Downloads > Archive (1)'. A red box highlights this path. The main area displays a list of files within the 'Archive (1)' folder. Two files are listed: 'GMD041733' and 'GMD041739'. Both files are identified as 'Chrome HTML Document' type files. The 'GMD041733' file has a size of 22 KB and a password of No. The 'GMD041739' file has a size of 16,950 KB and a password of No. The left sidebar shows standard folder navigation options like Desktop, Documents, Downloads, Pictures, OneDrive, This PC, 3D Objects, Desktop, Documents, Music, Pictures, Videos, and Network.

Figure 7.5.3 Downloaded Zip File



8. Document Workflow

A workflow is a sequence of connected tasks applied to a document, such as a document review. A user may use a set of predefined workflow definitions in the application. As shown in Figures 8.1 through 8.4 for an example of document workflow.

To workflow a document, a user would need to open the document and select the 'Start Workflow' option from Document Actions.

The screenshot shows a Microsoft Word document titled "Test Word Document.docx". The document content is a single line of text: "This is a test word document." followed by a numbered list: 1. This is test line 1; 2. This is test line 2; 3. This is test line 3; 4. This is test line 4; 5. This is test line 5. To the right of the document, a "Document Actions" menu is displayed, listing various options like "View In Browser", "Edit in Microsoft Office™", and "Start Workflow". The "Start Workflow" option is highlighted with a red box.

Figure 8.1 Document Actions 'Start Workflow'



Select the 'Review and Approve (single reviewer)' option from the 'Workflow' field. Other workflow options include 'New Task', 'Review and Approve (group review)', 'Review and Approve (one or more reviewer)', 'Review and Approve (pooled review)', and 'Submit Documents'.

A screenshot of the Ginnie Mae DAMS system interface. At the top, there's a header with the Ginnie Mae logo and the text "Ginnie Mae Public" and "Public". Below the header, a dropdown menu is open under the heading "Workflow". The dropdown contains several options: "New Task", "Assign a new task to yourself or a colleague"; "Review and Approve (group review)", "Assign a review task to a group"; "Review and Approve (one or more reviewers)", "Assign a review task to multiple reviewers"; "Review and Approve (pooled review)", "Assign a review task to multiple reviewers, who can take ownership of the task"; "Review And Approve (single reviewer)", which is highlighted with a blue background and the sub-instruction "Assign a review task to a single reviewer"; and finally "submit Documents" which appears to be a duplicate entry. The "Review And Approve (single reviewer)" option is the one selected for the task.

Figure 8.2 Review and Approve (single reviewer)



Then click on the 'Select' button under the 'Reviewer' field, enter the user name in the search field and click the 'Search' and 'OK' buttons to search for a user that will review the document. Enter Workflow details such as 'Message', 'Priority', and 'Due' date, and then click the 'Start Workflow' button.

The screenshot shows the 'REVIEW AND APPROVE (SINGLE REVIEWER)' workflow configuration screen. The 'General' section is highlighted with a red box. It contains fields for 'Message' (containing 'Please review the document and provide feedback.'), 'Due' date (09/09/2022), 'Priority' (Medium), and 'Assignee' (CNMA MANAGER). Below the General section is an 'Items' list containing a single item: 'Test Word Document.docx'. At the bottom are 'START WORKFLOW' and 'CANCEL' buttons.

Figure 8.3 Workflow Details



An email will be sent to the reviewer with a message, due date, and priority.

A screenshot of an Outlook inbox showing an email from "noreply@dams-sit.ginniemae.cloud". The subject is "You have been assigned a task". The email body contains the following text:

You have been assigned a task
Thursday, September 8, 2022 at 1:49:03 PM Eastern Daylight Time

Hi,

You have been assigned the following task:

"Review"

Please review the document and provide feedback.

Due: Friday, September 9, 2022
Priority: Medium

A file attachment is shown with the following details:

Test Word Document.docx
Right-click or tap and hold here to
Click on this link to download the document:
<https://dams-sit.ginniemae.cloud/share/proxy/alfresco/api/node/content/workspace/SpacesStore/d1d9455a-013c-4b52-9d3b-5892f6d5cde0/Test Word Document.docx?a=true>

Click this link to edit the task:
[https://dams-sit.ginniemae.cloud/share/page/task-edit?taskId=activity\\$2045](https://dams-sit.ginniemae.cloud/share/page/task-edit?taskId=activity$2045)

Sincerely,
Alfresco Share

Figure 8.4 Workflow Review Email



A task will be created for the **reviewer** under the My Task section of the user dashboard, as shown in Figure 8.5. The reviewer will need to select the review task in order to update or complete the task.

The screenshot shows the GinnieMae DAMS / CNMA MANAGER Dashboard. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, Repository, and CNMA MANAGER. A search bar is also present. The main content area is divided into several sections:

- My Sites**: Shows one site, "Ginnie Mae Public", which is described as "This site is for public Ginnie Mae content".
- My Activities**: Displays recent activity from "CNMA COLLABORATOR" including previewing, updating, and downloading documents.
- My Tasks**: Shows a list of tasks. One task is highlighted with a red box:
 - Task title: "Please review the document and provide feedback."
 - Date: "09/09/2022"
 - Status: "Review, Not Yet Started"
- My Documents**: A section titled "Keep track of your own content" that lists recently modified documents.

Figure 8.5 Reviewer Task



The **reviewer** will need to update the 'Status' field with one of the following options, 'Not Yet Started', 'In Progress', 'On Hold', 'Cancelled', and 'Completed', then select the 'Save and Close' button if only updating the status. In addition, the user may include a comment in the 'Comment' field and click on the 'Approve' or 'Reject' button which will complete the task.

GinnieMae DAMS / Edit Task

Edit Task: Review

REASSIGN

* Required Fields

Info

Message: Please review the document and provide feedback.

Owner: GNM MANAGER Priority: Medium Due: 2022-09-09T00:00:00.000-04:00

Identifier: 2045

Progress

Status: Completed

Items

Test Word Document.docx Description: (None) View More Actions Modified on: 09/08/2022 11:47:48

Response

Comment: Document approved.

APPROVE REJECT

SAVE AND CLOSE CANCEL

Figure 8.6 Edit Task: Review



An email will be sent to the originator with a message and approval status.

noreply@dams-sit.ginniemae.cloud | 1:59 PM

You have been assigned a task

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

 Right-click or tap and hold here to download
You have been assigned a task
Thursday, September 8, 2022 at 1:59:09 PM Eastern Daylight Time

Hi,

You have been assigned the following task:

"Approved"

The document was reviewed and approved.

Due: Friday, September 9, 2022
Priority: Medium

 Right-click or tap and hold here to download
Test Word Document.docx
Click on this link to download the document:
<https://dams-sit.ginniemae.cloud/share/proxy/alfresco/api/node/content/workspace/SpacesStore/d1d9455a-013c-4b52-9d3b-5892f6d5cede0/Test Word Document.docx?a=true>

Click this link to edit the task:
[https://dams-sit.ginniemae.cloud/share/page/task-edit?taskId=activiti\\$2117](https://dams-sit.ginniemae.cloud/share/page/task-edit?taskId=activiti$2117)

Sincerely,
Alfresco Share

Figure 8.7 Workflow Approval Email



A task will be created for the workflow originator under the My Task section of the user dashboard, as shown in Figure 8.8. The user will need to select the review task in order to update or complete the task.

The screenshot shows the GinnieMae DAMS GNMA COLLABORATOR Dashboard. At the top, there is a navigation bar with links for Home, My Files, Shared Files, Sites, Tasks, People, and Repository. A search bar is also present. Below the navigation bar, the page title is "GinnieMae DAMS / GNMA COLLABORATOR Dashboard".

The main content area is divided into several sections:

- My Sites**: Shows one site: "Ginnie Mae Public". It is described as "This site is for public Ginnie Mae content". There is a "Create Site" link.
- My Activities**: Shows activity feed for "Everyone's Activities" over the last 7 days. The feed includes three items from "CNMA COLLABORATOR":
 - previewed document "Test Word Document.docx" in "Ginnie Mae Public" 12 minutes ago
 - updated document "Test Word Document.docx" in "Ginnie Mae Public" 2 hours ago
 - downloaded document "Test Word Document (Working Copy).docx" in "Ginnie Mae Public" 2 hours ago
- My Tasks**: Shows "ACTIVE TASKS" with 1 item. The task details are:
 - Start Workflow
 - Active Tasks | Completed Tasks
 - << < 1-1 of 1 > >
 - The document was reviewed and approved.
09/09/2022
Approved, Not Yet StartedThe entire task card is highlighted with a red border.
- My Documents**: Shows "I've RECENTLY MODIFIED" with 1 item:
 - Test Word Document.docx
Modified 2 hours ago in "Ginnie Mae Public"

Figure 8.8 Workflow Originator Task



The workflow **originator** will need to update the 'Status' field with one of the following options, 'Not Yet Started', 'In Progress', 'On Hold', 'Cancelled', and 'Completed', then select the 'Save and Close' button if only updating the status. In addition, the user may include a comment in the 'Comment' field and click on the 'Task Done' button which will finish the workflow.

GinnieMae DAMS / Edit Task

Edit Task: Approved

REASSIGN

* Required Fields

Info

Message: The document was reviewed and approved.

Owner: GINNIE MAE COLLABORATOR Priority: Medium Due: 09/03/2022

Identifier: 2117

Progress

Status: Completed

Items

Test Word Document.docx

Description: (None) View More Actions

Modified on: 09/08/2022 11:47:48

Response

Comment: Document approved.

+ TASK DONE

SAVE AND CLOSE CANCEL

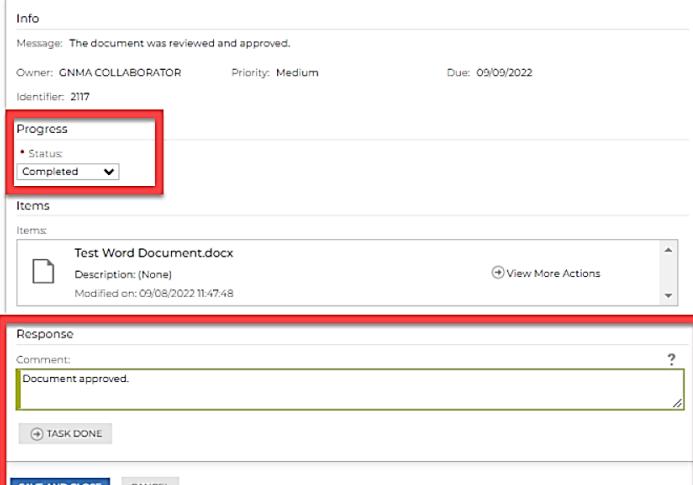


Figure 8.9 Edit Task: Approved



9. Using DAMS from MS Outlook

The DAMS application includes an integration with Microsoft Outlook that allows a user to access email and DAMS repository without having to leave Microsoft Outlook. Features of Outlook Integration include the ability to archive content (i.e. emails, meetings, appointments, and files) into DAMS, full metadata support, full search capability, tagging, and the ability to attach files and view archived emails in a user's inbox. In addition, a user can create new versions of existing documents, review the version history of a versioned document, and revert back to previous versions.

For your first login, from the Outlook Client a user will need to select the '*DAMS*' tab from the Microsoft Outlook toolbar. A user will need to select the '*Configure*' option, to setup the DAMS connection information. Enter '<https://dams.ginniemae.gov>' for the '*Server URL*', Authentication '*Login Name*', and Authentication '*Password*', as seen in Figures 9.1 and 9.2.

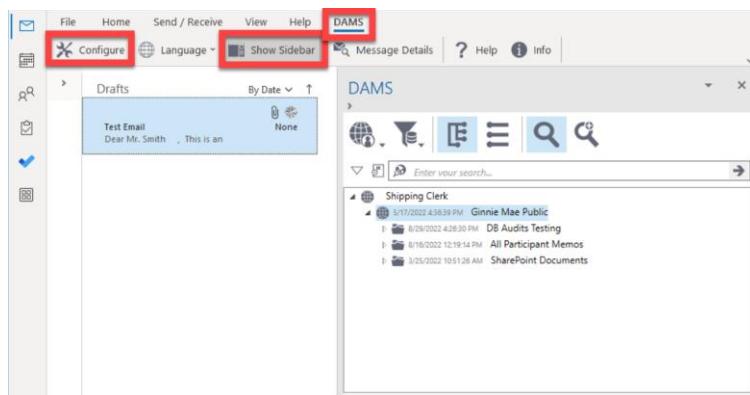


Figure 9.1 Outlook DAMS Tab

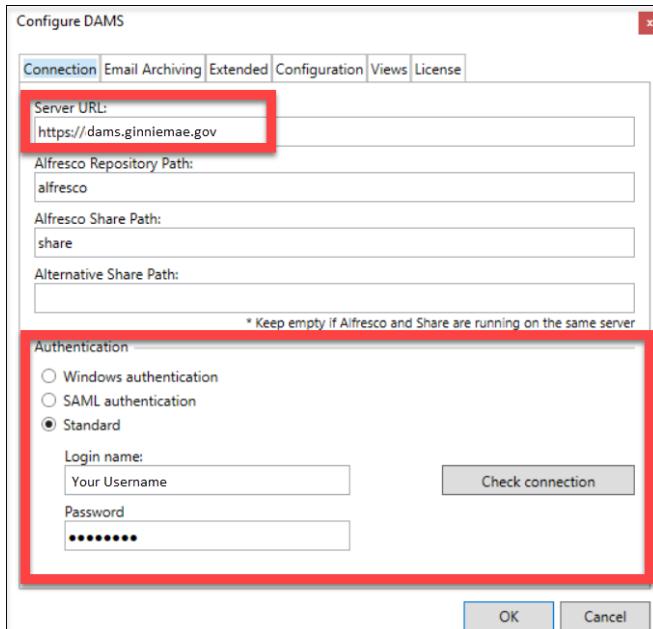


Figure 9.2 Outlook Client Configure Tab



When you have successfully logged into DAMS using the Outlook Client and have selected the 'Show Sidebar' option from the DAMS Alfresco Client tab, a user will see their sites populated in the DAMS Outlook Sidebar, see Figure 9.3.

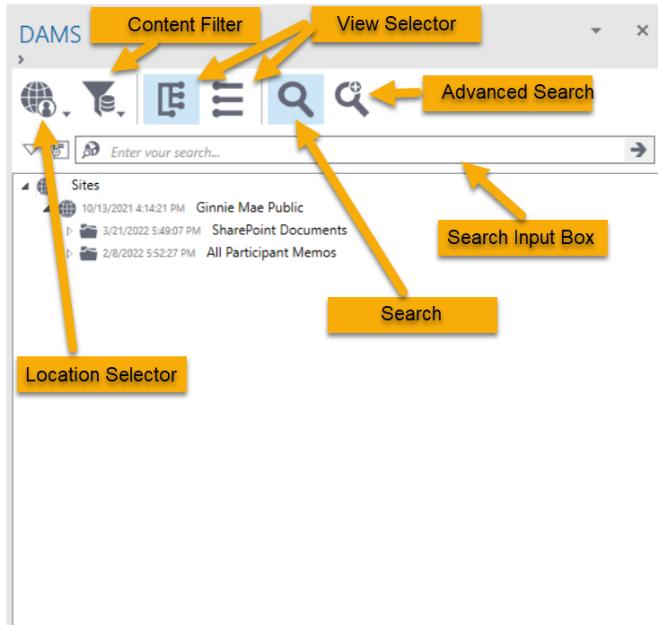


Figure 9.3 DAMS Outlook Side Bar Menu Options

9.1 Searching for a File

To perform a simple search, a user will enter the specific search criteria in the Search Box. This can be seen in Figure 9.1.1 where the word 'Test' is displayed. Once a user clicks on the right arrow icon the content that matches your search criteria is displayed in the result box. A user may choose their favorite folders or sites to filter the search. Once a user selects a folder from the results returned, use the 'Back' arrow (pointing left) to return to the search results from the original search location.

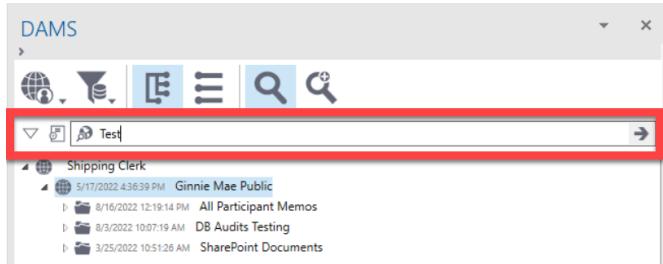


Figure 9.1.1 DAMS Outlook Search

A user can clear the search results by clicking 'X' next to the search box, and start a new search, as seen in Figure 9.1.2.

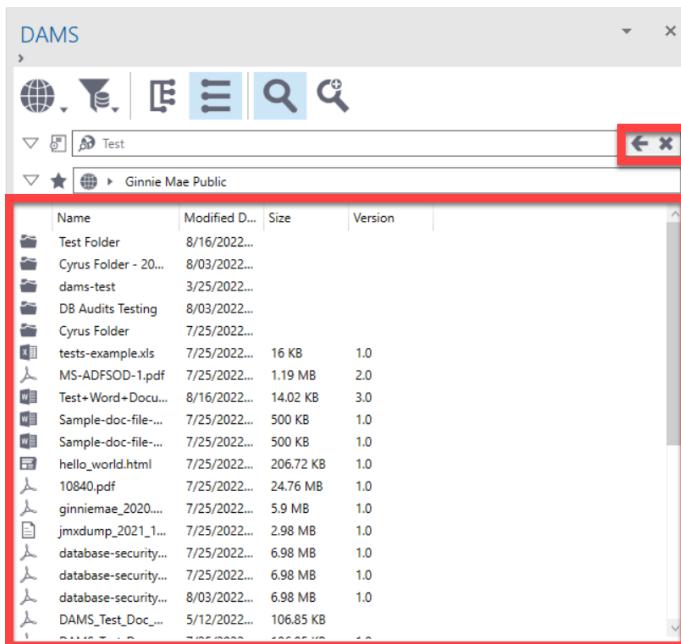


Figure 9.1.2 DAMS Outlook Search Results



An advanced search allows a user to enter multiple search criteria in a more targeted search. To perform an Advanced Search, a user will need to click on the 'Advanced Search' button, a magnifying glass with a plus symbol. A user will need to enter the advanced search criteria as needed and click on the 'Search' button. As seen in Figures 9.1.3 and 9.1.4.

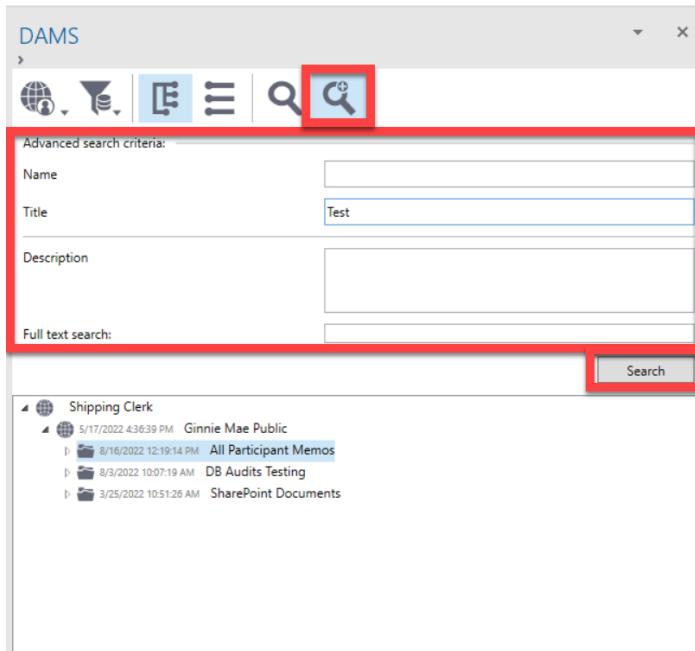


Figure 9.1.3 DAMS Outlook Advanced Search



The screenshot shows the DAMS Outlook Advanced Search Results window. At the top, there are search icons and fields for Name, Title, and Description. Below these are buttons for Back to results, Clear, and Search. A red box highlights the search results table, which lists files under 'All Participant Memos'. The table columns are Name, Modified D..., Size, and Version. The listed files are:

Name	Modified D...	Size	Version
Test Folder	8/16/2022...		
GMD041733.pdf	10/12/202...	25.1 KB	1.0
GMD041739.pdf	10/12/202...	19.5 MB	1.0
GMD041742.pdf	10/12/202...	6.96 MB	1.0
GMD041743.pdf	10/12/202...	5.18 MB	1.0
GMD041744.pdf	10/12/202...	1.29 MB	1.0

Figure 9.1.4 DAMS Outlook Advanced Search Results

9.2 Upload an Email and Attachments

A user may select an email if they want to store the email in DAMS. (Note: if the email contains attachments they will automatically come over.) To accomplish this, a user will drag and drop the email (and attachments) into a selected folder, then populate the required metadata, as seen in Figure 9.2.1.

The screenshot shows the DAMS Outlook - Upload Email interface. On the left, the inbox shows several messages from 'noreply@dams-sit.ginnie...'. One message is highlighted with a red box. On the right, the DAMS library shows a folder structure. A message from 'Shipping Clerk' is selected, and its details are shown in a preview pane. A red box highlights the message body, which contains the subject 'DB Audits Testing'.

Figure 9.2.1 DAMS Outlook - Upload Email



The uploaded Outlook email will display a circular symbol to denote that it was saved in DAMS, as seen in Figure 9.2.2.

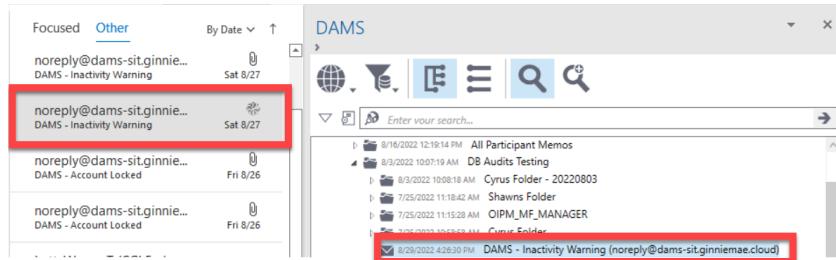


Figure 9.2.2 DAMS Outlook - Uploaded Email

9.3 Browse and Upload Files

A user may browse the files stored within the folders under any site displayed within the DAMS sidebar. Click on the triangle icon to the left of the folder to expand and view the files stored within.

To upload a file, a user will need to select a file from their desktop, drag and drop it into a selected folder (Figure 9.3.1), populate the required metadata for the file, and click the 'Save' button (Figure 9.3.2).

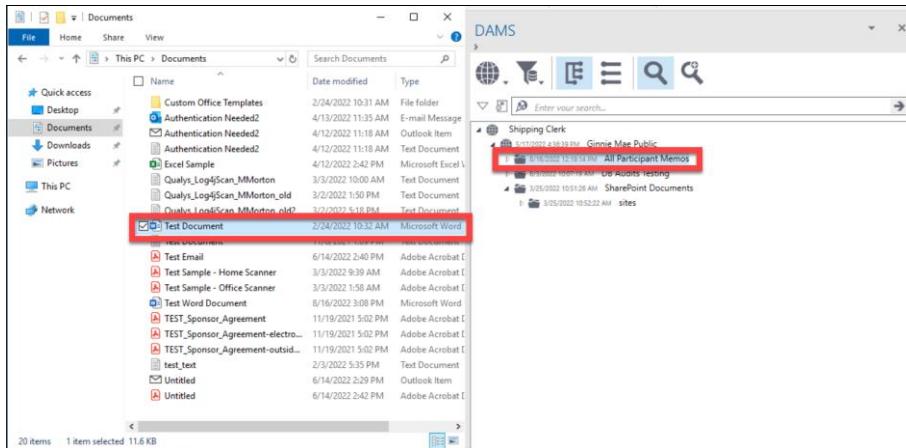


Figure 9.3.1 DAMS Outlook - Upload File



Metadata

1 / 1 Test Document.docx

APM Number	100
APM Year	2023

Remember metadata for next object

Previous | Apply to all files | Cancel | **Save** | Next

A screenshot of a Microsoft Outlook "Metadata" dialog box. The dialog shows two fields: "APM Number" with the value "100" and "APM Year" with the value "2023". Both fields are highlighted with a red rectangular box. At the bottom, there are buttons for "Previous", "Apply to all files", "Cancel", "Save" (which is highlighted with a red box), and "Next". There is also a checkbox for "Remember metadata for next object".

Figure 9.3.2 DAMS Outlook File Metadata



10. SharePoint Folder

DAMS provides an integration with SharePoint where documents can be shared. For each Ginnie Mae Program Office, a ‘DAMS’ sub-site will be created in SharePoint. The DAMS Team will work with each Ginnie Mae Program Office to ensure the sub-site is created at the office and/or division level. For example, in Figure 10.1 a user sees the sub-site named “DAMS” within the Office of the Chief Financial Officer SharePoint site.

A screenshot of a SharePoint interface. At the top, there's a navigation bar with 'SharePoint', 'Ginnie Mae', 'Budget Office', a search bar, and other navigation icons. Below the navigation bar, the page title is 'Office of the Chief Financial Officer'. On the left, there's a navigation menu with 'Documents', 'Pictures', 'Lists', 'Discussions', and 'Surveys'. Under 'Lists', a sub-menu shows 'Contents' and 'Subsites'. A red box highlights the 'Subsites' link. In the main content area, there's a table titled 'Contents' with columns: Name, Description, Views, Created, and Modified. A single row is visible, showing a blue icon, the name 'DAMS', and the text '14 days ago' under 'Created' and '3 days ago' under 'Modified'. A red box highlights the 'DAMS' entry. At the bottom of the page, there's a link 'Return to classic SharePoint'.

Figure 10.1 DAMS Sub-site in SharePoint



In Figure 10.2, within the 'DAMS' sub-site a user would click on the 'Documents' Library. It is within this location that a user would upload a document(s) to be migrated to DAMS. The migration process to DAMS will be run every 10 minutes.

The screenshot shows a SharePoint interface. The address bar displays the URL: <https://hudgov.sharepoint.com/sites/SEC/gnma/F/DAMS/Shared%20Documents/Forms/AllItems.aspx>. The navigation bar on the left lists several items: Home, Notebook, Documents (which is selected and highlighted in grey), Pages, DAMS Test, Site contents, and Edit. The main content area is titled 'Documents' and contains a list of four files: 'RISK_LOG2.xlsx', 'REQ_MGT2.pdf', 'PROJ_INIT_V2.docx', and 'IMP_PLAN.pdf'. Each file entry includes its name, a small icon, the date it was modified ('A few seconds ago'), and the user who modified it ('Katiyar (CTR), Neelesh').

Figure 10.2 DAMS Folder in SharePoint

Once in DAMS, a user may view the document(s) migrated from SharePoint. Using the OCFO example above, a user will need to select each path location below in DAMS:

- Office site (e.g., *OCFO*)
- '*Document Library*'
- '*SharePoint Documents*'
- '*sites*' folder
- '*SEC*' folder
- '*gnma*' folder
- Office folder (e.g., '*F*')
- '*DAMS*'
- '*Shared Documents*'



Figure 10.3 displays a single 'SharePoint Documents' folder location in DAMS.

The screenshot shows the GinnieMae DAMS SharePoint interface. The top navigation bar includes links for Home, My Files, Shared Files, Sites, Tasks, People, Repository, and a search bar. The main content area is titled 'GinnieMae DAMS / OCFO [Moderated]'. On the left, there's a navigation pane with sections for Documents (All Documents, I'm Editing, Others are Editing, Recently Modified, Recently Added, My Favorites), Library (Documents, SharePoint Documents, Treasury Division), and Categories (Category Root). The right side shows a 'Document Library' view with a list of items. A single folder named 'SharePoint Documents' is highlighted with a red box. Below it is another folder named 'Treasury Division'. The interface includes standard SharePoint controls like 'SELECT', '+ CREATE...', 'UPLOAD', 'CREATED', and 'OPTIONS'.

Figure 10.3 SharePoint Documents Folder in DAMS

Figure 10.4 displays the entire path location that is highlighted in DAMS.

This screenshot continues the GinnieMae DAMS SharePoint interface. The navigation pane on the left shows the full document library path: 'Documents > SharePoint Documents > sites > SEC > gnma > F > DAMS > Shared Documents'. This path is highlighted with a red box. The main content area shows a list of four files under 'Shared Documents': 'PROJ_INIT_V2.docx', 'IMP_PLAN.pdf', 'REQ_MCT2.pdf', and 'RISK_LOC2.xlsx'. Each file has a small thumbnail, a creation date ('Created 5 days ago by Admin User'), a file size, and a 'Like' button.

Figure 10.4 Shared Documents Folder in DAMS



11. Records Management (This is for Records Management Users Only)

Records Management is the lifecycle management of a document from storage to archiving and final disposition of a document. Currently, an Office/Division Manager has the rights to access the Records Management will be able to save a document as a record. Please note, that the DAMS System Administrator would need to set up a manager with Records Management rights.

11.1 File as Record

To file a document as a record, a Division Manager would need to open the specified document and select the 'File as Record' or 'File Version as Record' option from Document Actions. The 'File as Record' will file all versions as a record and the 'File Version as Record' will file a specific version as a record. Then select the folder destination and click on the 'Declare and File' button, as shown in Figures 11.1.1 and 11.1.2.

The screenshot shows a document preview for 'TEST_Sponsor_Agreement.pdf'. The document content is: 'THIS IS A SAMPLE FILE FOR DAMS DEMO PURPOSE ONLY!'. To the right is a 'Document Actions' menu. The 'File as Record' option is highlighted with a red box. Other options include 'View in Browser', 'Edit Offline', 'Upload New Version', 'Edit Properties', 'Move to...', 'Copy to...', 'Delete Document', 'Start Workflow', 'Manage Permissions', 'Become Owner', 'Manage Aspects', 'Change type', 'Email as link', 'File Version as Record', 'Auto-Declare Options', and 'Add to Hold'.

Figure 11.1.1 Records Management - File as Record

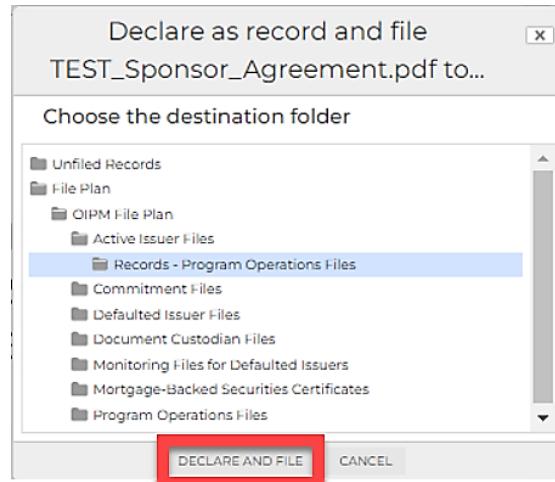


Figure 11.1.2 Records Management - Declare and File

A user with Records Management access will need to go into the Record Management File Plan structure by clicking on 'Sites', 'Records Management', 'File Plan', an office File Plan (e.g., OIPM File Plan), and a Records Management folder where the specific record will reside (e.g., Records-Program Operations Files), see Figure 11.1.3.

Figure 11.1.3 Records Management File Plan



A user will need to open the 'Incomplete Record' and click on the '*Complete Record*' option from Document Actions, see Figure 11.1.4. A user may also edit existing metadata fields using the 'Edit Metadata' action and then click the 'Save' button when complete.

The screenshot shows a file management interface for 'GinnieMae DAMS'. At the top, there's a navigation bar with links like Home, My Files, Shared Files, Sites, Tasks, People, and Repository. The current page is 'File Plan'. On the left, a breadcrumb trail shows 'File Plan > OIPM File Plan > Active Issuer Files > Records - Program Operations Files'. The main content area displays a PDF document titled 'TEST_Sponsor_Agreement (2022-1663184943378).pdf'. The PDF content is a sample file: 'THIS IS A SAMPLE FILE FOR DAMS DEMO PURPOSE ONLY!'. Below the PDF, there are download and print options. To the right, a sidebar titled 'Actions' lists various options: Edit Metadata, Complete Record (which is highlighted with a red box), Copy to..., Move to..., Link to..., Delete, View Audit Log, Reject, Request Information, Manage Permissions, and Add Relationship. The 'Complete Record' option is the one being referred to in the caption.

Figure 11.1.4 Records Management - Complete Record



12. User Management (This is only for DAMS System Administrators)

User Management allows for the creation of new DAMS user, the modification of DAMS user rights, lock user accounts, unlock user accounts, clear security questions, and force password resets. User Management will only be available to a user with DAMS administrative rights.

To access User Management functionality, a user will need to select the '*User Management*' link from the toolbar across the top of the screen, as shown in Figure 12.1.

The screenshot shows the GinnieMae DAMS dashboard for Sally Smith. The top navigation bar includes links for Home, My Files, Shared Files, Sites, Tasks, People, Repository, Admin Tools, and User Management. The 'User Management' link is highlighted with a red box. Below the navigation bar, there are several dashlets: 'My Sites' (with a 'Create Site' button), 'My Activities' (with filters for Everyone's Activities, All Items, and In the Last 7 Days), 'My Tasks' (with sections for Active Tasks and Completed Tasks, including a 'Review the tasks assigned to you' section), and 'My Documents' (with a 'Keep track of your own content' section). The URL in the address bar is 'GinnieMae DAMS / Sally Smith Dashboard'.

Figure 12.1 User Management

12.1 Create a New User

To create a new user in DAMS, the administrative user will need to click on the '*New User*' button and fill in the required user information. This information includes 'Username', 'Email', 'First Name', 'Last Name', temporary 'Password', temporary 'Repeat Password', 'User Type', 'Site', 'Division', 'Role', and 'Action'. After the user information has been completed, the administrative user will need to click on the '*Save User*' button. Please see Figure 12.1.1.



Home My Files Shared Files Sites Tasks People Repository Admin Tools User Management Sally Smith Search files, people, sites

GinnieMae DAMS User Management

Users

CDF.INDASSOC.CONTRIBUTOR (email@fakeuser@email.com)
CDF.INDASSOC.CONTRIBUTOR (email@fakeuser@email.com)
CDF.INDASSOC.MANAGER (email@fakeuser@email.com)
CDF.MEDIA.COLLABORATOR (email@fakeuser@email.com)
CDF.MEDIA.CONTRIBUTOR (email@fakeuser@email.com)
CDF.MEDIA.CONTRIBUTOR (email@fakeuser@email.com)
CDF.MEDIA.MANAGER (email@fakeuser@email.com)
CDF.OCFR.CONTRIBUTOR (email@fakeuser@email.com)
CDF.OCFR.CONTRIBUTOR (email@fakeuser@email.com)
CDF.OCFR.CONTRIBUTOR (email@fakeuser@email.com)
CNA.MA.COLLABORATOR (email@fakeuser@email.com)
CNA.MA.CONTRIBUTOR (email@fakeuser@email.com)
CNA.MA.MANAGER (email@fakeuser@email.com)
OCFO.BUDGET.COLLABORATOR (email@fakeuser@email.com)
OCFO.BUDGET.CONSUMED (email@fakeuser@email.com)
OCFO.BUDGET.CONTRIBUTOR (email@fakeuser@email.com)
OCFO.BUDGET.MANAGER (email@fakeuser@email.com)
OCFO.CONTROLLER.COLLABORATOR (email@fakeuser@email.com)
OCFO.CONTROLLER.CONTRIBUTOR (email@fakeuser@email.com)
OCFO.CONTROLLER.CONTRIBUTOR (email@fakeuser@email.com)

LOCK ACCOUNT UNLOCK ACCOUNT CLEAR SECURITY QUESTIONS FORCE PASSWORD RESET NEW USER

Edit User

Required Fields

Username: CNA.MA.COLLABORATOR

Email: email@fakeuser@email.com

First Name: CNA.MA

Last Name: COLLABORATOR

Organization: Ginnie Mae

Password:

Repeat Password:

User Type: Normal User Administrator

Site Memberships:

Site: Select CNA.MA Division: Select APM Role: Select COLLABORATOR Action: Add Remove

SAVE USER

Figure 12.1.1 New User

12.2 Modify an Existing User

To modify an existing user in DAMS, the administrative user will need to select the user from the User list, then modify the user information. This information may include ‘Username’, ‘Email’, ‘First Name’, ‘Last Name’, temporary ‘Password’, temporary ‘Repeat Password’, ‘User Type’, ‘Site’, ‘Division’, ‘Role’, and ‘Action’. After the user information has been modified, the administrative user will need to click on the ‘Save User’ button. Please see Figure 12.2.1.

Home My Files Shared Files Sites Tasks People Repository Admin Tools User Management Sally Smith Search files, people, sites

GinnieMae DAMS User Management

Users

CDF.INDASSOC.CONSUMER (email@fakeuser@email.com)
CDF.INDASSOC.CONTRIBUTOR (email@fakeuser@email.com)
CDF.INDASSOC.MANAGER (email@fakeuser@email.com)
CDF.MEDIA.COLLABORATOR (email@fakeuser@email.com)
CDF.MEDIA.CONSUMER (email@fakeuser@email.com)
CDF.MEDIA.CONTRIBUTOR (email@fakeuser@email.com)
CDF.MEDIA.MANAGER (email@fakeuser@email.com)
CDF.OCFR.COLLABORATOR (email@fakeuser@email.com)
CDF.OCFR.CONTRIBUTOR (email@fakeuser@email.com)
CDF.OCFR.MANAGER (email@fakeuser@email.com)
CNA.MA.COLLABORATOR (email@fakeuser@email.com)
CNA.MA.CONTRIBUTOR (email@fakeuser@email.com)
CNA.MA.MANAGER (maria.moroni@cgfederal.com)
OCFO.BUDGET.CONSUMED (email@fakeuser@email.com)
OCFO.BUDGET.CONTRIBUTOR (email@fakeuser@email.com)
OCFO.BUDGET.MANAGER (email@fakeuser@email.com)
OCFO.CONTROLLER.CONTRIBUTOR (email@fakeuser@email.com)
OCFO.CONTROLLER.CONSUMER (email@fakeuser@email.com)
OCFO.CONTROLLER.MANAGER (email@fakeuser@email.com)

LOCK ACCOUNT UNLOCK ACCOUNT CLEAR SECURITY QUESTIONS FORCE PASSWORD RESET NEW USER

Edit User

Required Fields

Username: CNA.MA.COLLABORATOR

Email: email@fakeuser@email.com

First Name: CNA.MA

Last Name: COLLABORATOR

Organization: Ginnie Mae

Password:

Repeat Password:

User Type: Normal User Administrator

Site Memberships:

Site: Select CNA.MA Division: Select APM Role: Select COLLABORATOR Action: Add Remove

SAVE USER

Figure 12.2.1 Modify Existing User



12.3 Unlock a User

User accounts may be locked if the user does not access the account over 30 days or a user has entered 3 incorrect password entries. To unlock the user account for an existing user in DAMS, the administrative user will need to select the ‘Unlock Account’ button, as shown in Figure 12.3.1. In addition, a user will need to confirm the selection is valid.

The screenshot shows the 'Edit User' page in the GinnieMae DAMS system. On the left, a list of users is displayed, with 'CNMA_COLLABORATOR' selected. On the right, the 'Edit User' form is shown with the following details:

- Required Fields:**
 - Username: CNMA_COLLABORATOR
 - Email: emma@fakeuseremail.com
 - First Name: CNMA
 - Last Name: COLLABORATOR
 - Organization: Ginnie Mae
 - Password: (empty)
 - Re-type Password: (empty)
- User Type:** Normal User (radio button selected)
- Site Memberships:** Site: Select (set to CNMA), Division: Select (set to APM), Role: Select (set to COLLABORATOR). Action buttons: Add, Remove.

At the bottom of the form is a 'SAVE USER' button.

Figure 12.3.1 Unlock Account

12.4 Clear User Security Questions

To clear the security questions for an existing user in DAMS, the administrative user will need to select the ‘Clear Security Questions’ button, as shown in Figure 12.4.1. In addition, a user will need to confirm the selection is valid.

The screenshot shows the GinnieMae DAMS User Management interface. On the left, there is a list of user roles with one item selected: 'CNMA_COLLABORATOR (email@fakeuser@email.com)'. On the right, the 'Edit User' form is displayed for this user. The 'CLEAR SECURITY QUESTIONS' button is highlighted with a red box.

Figure 12.4.1 Clear Security Questions

12.5 Force User Password Reset

If a user has forgotten their password, then an administrator may force a reset of the user's password upon next login.



To force a reset of a user password for an existing user in DAMS, the administrative user will need to select the 'Force Password Reset' button, as shown in Figure 12.5.1. In addition, a user will need to confirm the selection is valid. When the existing user attempts to login the next time, the application will force the user to update their DAMS password, as per Ginnie Mae password requirements.

The screenshot shows the 'Edit User' page in the GinnieMae DAMS User Management system. On the left, a list of users is displayed, including various roles like 'CONSUMER', 'MANAGER', 'COLLABORATOR', etc. On the right, the details for a specific user ('CNMA_COLLABORATOR') are being edited. The 'FORCE PASSWORD RESET' button is highlighted with a red box at the bottom left of the edit form. Other fields visible include Username ('CNMA_COLLABORATOR'), Email ('email@fakeuser@email.com'), First Name ('CNMA'), Last Name ('COLLABORATOR'), Organization ('Ginnie Mae'), Password, Repeat Password, User Type ('Normal User'), and Site Memberships ('Select').

Figure 12.5.1 Force Password Reset

13. Help

A user would need to click on the User Account drop-down and select the 'Help' option to view Hyland Alfresco documentation, as shown in Figure 13.1 below.

The screenshot shows the 'GNMA COLLABORATOR Dashboard' in the GinnieMae DAMS system. The 'My Activities' section displays a list of recent site changes and user interactions. To the right, a user account dropdown menu is open, showing options like 'User Dashboard', 'My Profile', 'Help' (which is highlighted with a red box), and 'Reset Password'. A callout bubble from this menu contains the text: 'Commented [A3]: Need to verify/discuss with Sonya how Help will work – will they simply create a Ginnie Mae ticket in Service Now, call us directly and we enter the ticket, and will we go to Alfresco, not the Ginnie Mae user.'.

Figure 13.1 Help Link



Appendix A: Key Terms

Table 1 below provides definitions and explanations for terms and acronyms relevant to the content presented within this document.

Term	Definition
Advanced Search	<i>Accessed from the magnifying icon in the Search field located on the right-side of the navigation bar across the top of the page, specifically selecting the 'Advanced Search' option from drop-down. Allows the user to enter customized search criteria.</i>
API	<i>Application Programming Interface</i>
AWS	<i>Amazon Web Services</i>
Collaborator	<i>The role has full rights to the site content that they own; they have rights to edit but not delete content created by other site members.</i>
Consumer	<i>The role has view-only rights in a site: they cannot create their own content.</i>
Contributor	<i>The role has full rights to the site content that they own; they cannot edit or delete content created by other site members.</i>
DAMS	<i>Digital Asset Management Solution – an electronic document, record and content management system.</i>
DAMS URL	<i>The URL 'dams.ginniemae.gov', may be accessed through a web browser over a HUD VPN-enabled internet connection.</i>
Dashboard	<i>Home screen providing access to the most accessed features in an application.</i>
Forgot Password?	<i>If a password is forgotten/lost, the user will need to select the 'Forgot Password?' link located on the login page.</i>
IAM	<i>Identity Access Management</i>
Inactivity Warning	<i>A warning message will appear if a user does not interact with the DAMS application for 13 minutes. A user will need to select the 'Extend' button, navigate to a different page, or refresh the page to bypass the automatic logout.</i>
LDAP/AD	<i>Lightweight Directory Access Protocol / Active Directory</i>
Logout	<i>A user will need to click on the User Profile drop-down located on the Navigation Bar and select the 'Logout' option.</i>
Manager	<i>The role has full rights to all site content - what they have created themselves and what other site members have created.</i>
My Activities	<i>Part of the DAMS Dashboard, which allows users to navigate to documents that a user has accessed within the application.</i>
My Documents	<i>Part of the DAMS Dashboard, which allows users to navigate to documents that a user modified recently or saved as favorites.</i>



My Sites	<i>Part of the DAMS Dashboard, which allows users to navigate to locations within the application.</i>
My Tasks	<i>Part of the DAMS Dashboard, which allows users to navigate to a task that is assigned to the user.</i>
Navigation Bar	<i>The bar across the top of the page provides links to Home, My Files, Shared Files, Sites, Tasks, People, and Repository on the left and a link to the user's account settings and a search field on the right.</i>
Reset Password	<i>A user can reset their password by selecting the 'Reset Password' option from the User Profile drop-down.</i>
URL	<i>Uniform Resource Locator</i>
User Profile Drop-down	<i>Located next to the Search field located on the right-side of the navigation bar across the top of the page, specifically selecting the drop-down next to the user's name.</i>
VPN	<i>A virtual private network (VPN) extends a <u>private network</u> across a public network and enables users to send and receive data across shared or public networks as if their computing devices were directly connected to the private network. Reference: Wikipedia</i>

Table 1 - Key Terms