# EDM online

User Guide – TCS/NiSource

## Contents

# 1. Introduction

EDM online is a secure hosted Document Management system for the storage, search and retrieval of documents.
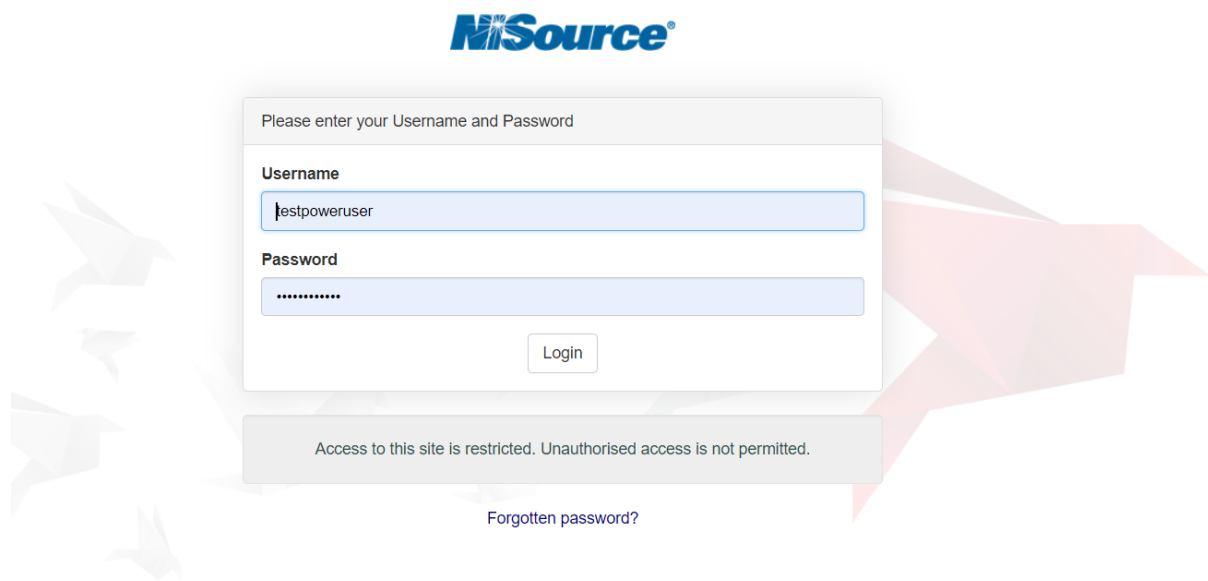
This document provides a general overview of the features and functionality of EDM online, but as the application can be configured in many different ways depending on your organisations specific needs and requirements you may find that some things differ from those described. Please refer to your System Administrators or EDM relationship manager for more specific guidance on your site.

## 2. Logging In

### 2.1. Logging in via a Web Browser

EDM is accessed via a Web Browser at
https://eolt02.edmamericas.com?x=0350130200460260650870011260200200095113065081081.



If you are unable to login or have forgotten your login details then your organisation may have enabled the **Forgotten password** feature which you will see a link to, or you may need to contact your Helpdesk or System Administrator for assistance.

Once logged in successfully you will be taken to the application home page which will look something like shown below1.



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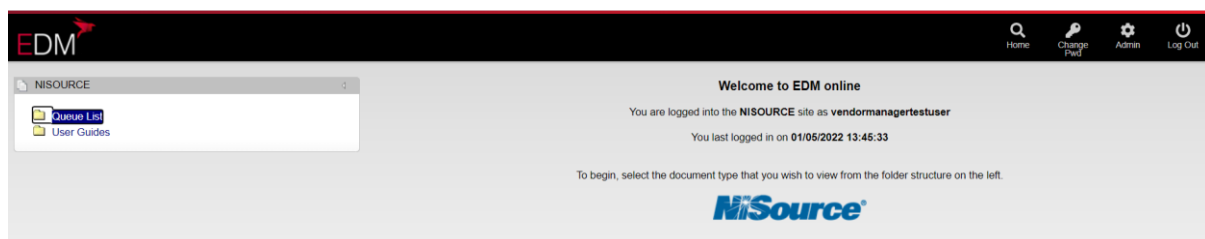
1 Note that the colours and branding may have been adjusted for your organisation.

## 2.2. Single Sign-on

EDM online supports the use of Single Sign-on technology2 to automatically log you in to the application and this is something that your organisation may have set up.

The way this is set up will depend on your own organisation but in most cases will mean that you either don't need to specifically enter any login details, or that you will use your standard network user credentials to login (usually via a different login page) which will take you directly in to the application.

In many cases you will have been provided with a specific URL or link to access the EDM online service, please refer to your Helpdesk or System Administrator if this is the case.

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2 This technology uses a secure login technology called SAML 2.0

# 3. Site Layout

All EDM online websites follow a simple and consistent layout for ease of use and intuitiveness.
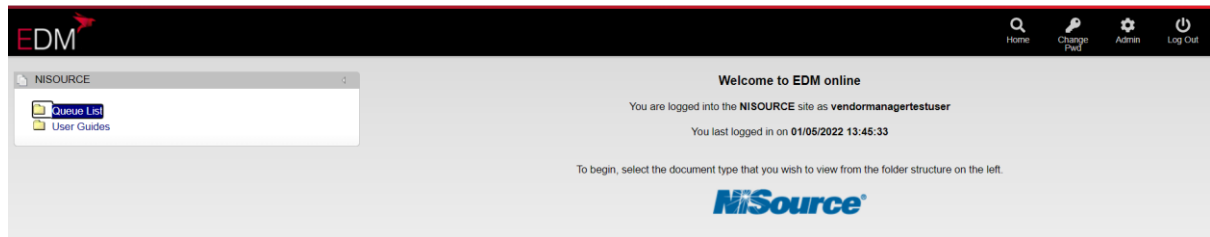


The toolbar along the top of the EDM online application provides access to some of the key areas of the site such as Search and Administration, and functions such as Password Change and Logout.

The icons available to you are determined by your permissions which will have been allocated to you by your System Administrator.
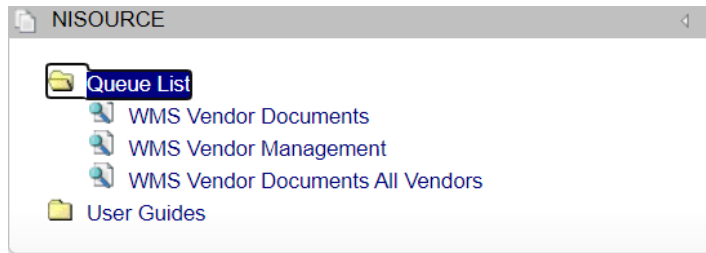
The left-hand pane of the application window will contain a hierarchical folder structure specific to your organisation containing links to the Document Searches, Queues, and Reports that you have been given access to.

Depending on how the site has been configured, these folders and features may be organised by Department, Document Type or Business function or other.

Everything within the EDM online application is permissions based so if you are expecting to see something that you can't see then please refer to your Helpdesk or System Administrator as it may be that your user account has not been given the necessary access.
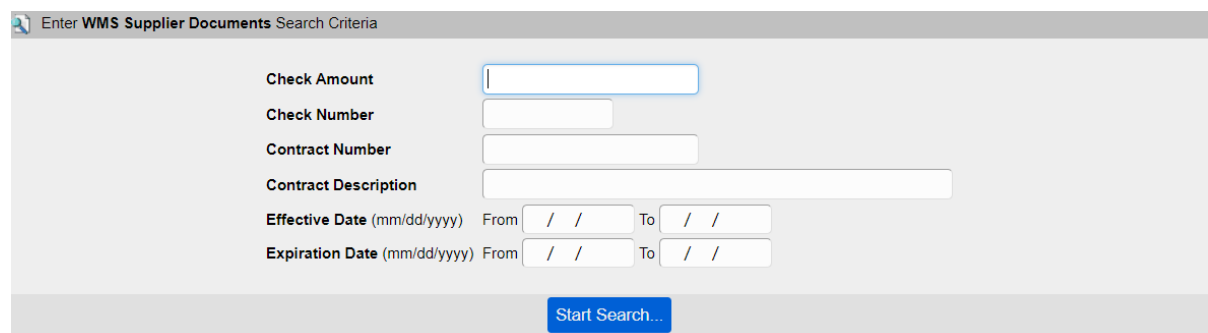
# 4. Searching for Documents

## 4.1.Document Queries

To search for documents, select the relevant Document Search query from the folder structure on the left-hand side of the window. The queries available to you will depend on your organisation and the permissions you have been granted.

Usually the Document Search queries will be indicated with a search icon such as shown below:

Upon selecting a Document Search query, you will be presented with search fields that you can use to search for documents. These are configured specifically for your organisation and the data that has been chosen to be made available to search by.

Enter **WMS Supplier Documents** Search Criteria

| | |
|---|---|
| **Check Amount** | |
| **Check Number** | |
| **Contract Number** | |
| **Contract Description** | |
| **Effective Date** (mm/dd/yyyy) | From / / To / / |
| **Expiration Date** (mm/dd/yyyy) | From / / To / / |

Start Search...

The types of fields and the way they can be used will also have been determined by your organisation when the query was set up and can include Text fields, dropdown lists and dates amongst others.

Some fields may also be mandatory to enter and these will be indicated with an asterisk (*) next to the field label.

Additionally, for Text fields (including numeric fields such as Account Number or Case Reference) it is possible to perform wildcard searches using asterisks to enable the following search types:

| Ends with… | *smith | The results will include anything that ends with *smith* such as *black*smith. |
|---|---|---|
| Starts with… | smith* | The results will include anything that begins with *smith* such as smith*sonian*. |
| Contains… | *smith* | The results will include anything that contains *smith* such as *black*smith*ing*. |

Note – search fields are not usually case-sensitive unless your organisation has specifically requested them to be so.

There are many ways for a document search to be configured which include advanced options such as dynamic or restricted lists where the contents of a dropdown may be dependent on your User permissions and/or the status or context of the item being searched for, or conditional fields where different fields may be shown or hidden.

### WMS Vendor Documents

The WMS Vendor Documents queue can be used to view all documents for a specific vendor. The user will need to be signed in as that vendor.

### WMS Vendor Management

The WMS Vendor Management will allow new vendors to be added to EDM Online by using the "Add New" row on the last page of queue.
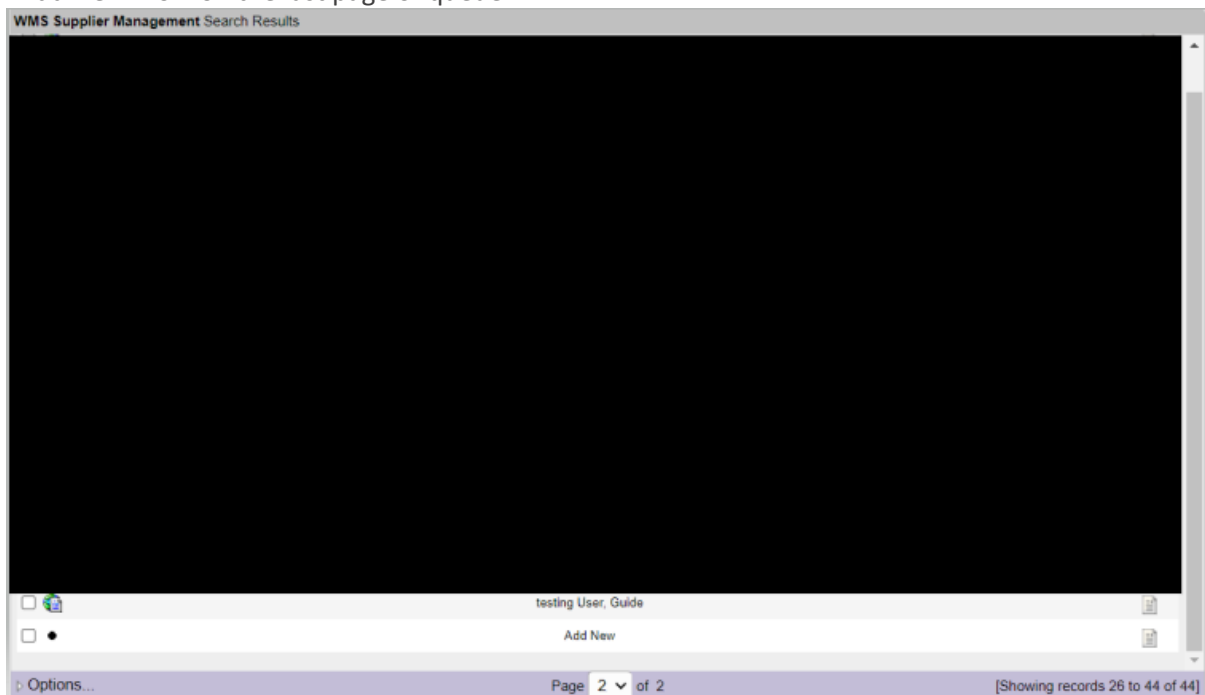
A popup window will open where the user can input the vendor's name and click save to save the new vendor in EDM Online.

### WMS Vendor Documents All Vendors

WMS Vendor Documents All Vendors will show all documents for all vendors if the User has access to this queue.

## 4.2.Search Results

When you run a Search you will be presented with the Search results that match the search criteria that you entered and they will presented in a grid as shown below.

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| | | Check Amount | Check Number | Contract Number | Contract Description | Effective Date | Expiration Date | Vendor Name | Option(s) |
|---|---|---|---|---|---|---|---|---|---|
| ☐ | 🅰 | 18925 | 37163158 | 12-6039-16 | M&R MOWING-PA NORTH | 05/07/2012 | 01/31/2023 | | 📄 |
| ☐ | 🅰 | 960 | 37162282 | 15-6783-01 | CPA GEN FENCE INSTALL | 10/01/2015 | 09/30/2021 | | 📄 |
| ☐ | 🅰 | 480 | 98002688 | 16-6864-04 | CMA TS-CORROSN ENG-NEW | | 01/04/2022 | | 📄 |
| ☐ | 🅰 | 6888 | 32018264 | 16-6873-04 | COH CKY ENGINEERING SVC | | 12/31/2021 | | 📄 |
| ☐ | 🅰 | 6845 | 37045798 | 16-6890-05 | MD,PA EAST MR MOWING-BO | | 03/31/2023 | | 📄 |
| ☐ | 🅰 | 3806.16 | 38026459 | 16-6979-04 | CGV LAND ACQ,SURVY,ENG | | 12/31/2023 | | 📄 |
| ☐ | 🅰 | 3813.36 | 38026362 | 16-6979-04 | CGV LAND ACQ,SURVY,ENG | | 12/31/2023 | | 📄 |
| ☐ | 🅰 | 139 | 98002951 | 16-7073-04 | CMA SURF REST - BAKER M | | 12/31/2020 | | 📄 |
| ☐ | 🅰 | 384 | 37162548 | 17-7238-04 | CPA NORTH BLKT SR-HAGER | | 02/28/2022 | | 📄 |
| ☐ | 🅰 | 672 | 37162636 | 17-7238-04 | CPA NORTH BLKT SR-HAGER | | 02/28/2022 | | 📄 |
| ☐ | 🅰 | 1008 | 37162802 | 17-7238-04 | CPA NORTH BLKT SR-HAGER | | 02/28/2022 | | 📄 |
| ☐ | 🅰 | 1963.41 | 34055972 | 17-7279-02 | COH-TRAFFIC CTRL SVC-WD | | 06/30/2021 | | 📄 |
| ☐ | 🅰 | 4856.37 | 34055644 | 17-7279-02 | COH-TRAFFIC CTRL SVC-WD | | 06/30/2021 | | 📄 |
| ☐ | 🅰 | 1907.6 | 37046144 | 17-7312-08 | CPA ROW FORELL INNOVATI | 01/01/2021 | 12/31/2021 | | 📄 |
| ☐ | 🅰 | 27689.72 | 37045592 | 17-7312-08 | CPA ROW FORELL INNOVATI | 01/01/2021 | 12/31/2021 | | 📄 |
| ☐ | 🅰 | 30267.58 | 37045943 | 17-7312-08 | CPA ROW FORELL INNOVATI | 01/01/2021 | 12/31/2021 | | 📄 |
| ☐ | 🅰 | 33636.8 | 37045776 | 17-7312-08 | CPA ROW FORELL INNOVATI | 01/01/2021 | 12/31/2021 | | 📄 |
| ☐ | 🅰 | 68257.19 | 37049192 | 17-7312-08 | CPA ROW FORELL INNOVATI | 01/01/2021 | 12/31/2021 | | 📄 |

Options...        Page 1 ▾ of 20        [Showing records 1 to 25 of 500]

Documents may be viewed simply by clicking on the relevant row, or the View icon (📄).

The search results can be sorted by clicking the column headings. Clicking on a heading again will toggle between Ascending and Descending sort order.

At the bottom of the search window there are also a number of additional options under the Options menu which will pop up automatically when you roll your mouse over it.
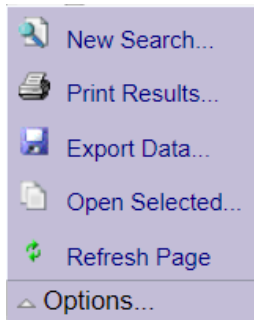


The exact options you are shown will depend on your individual user access rights and many of these functions are covered in more detail in section 5 Other Functions.

**New Search** will take you back to the Document Query page to perform a new search.

**Print Results** will open a new window containing the search results in a Printer friendly format.

**Export Data** can be used to export the search results as a data file in XML or CSV format (for loading in Microsoft Excel or similar). Refer to 5 Exporting Data for more information.

**Open Selected** can be used to open multiple selected documents in such a way that you can step forwards and backwards between them without having to return to the results page. This is covered in 4.4 Opening Multiple Documents.

**Refresh Page** simply refreshes the search results, which may have changed since the search was first done.

## 4.3.Viewing Documents

Documents may be viewed simply by clicking on the records returned in Query Search results or from Filing Trays or Queues.

Documents usually open in a new window3 which means that you can have multiple documents open at the same time if you wish and can easily switch between them.
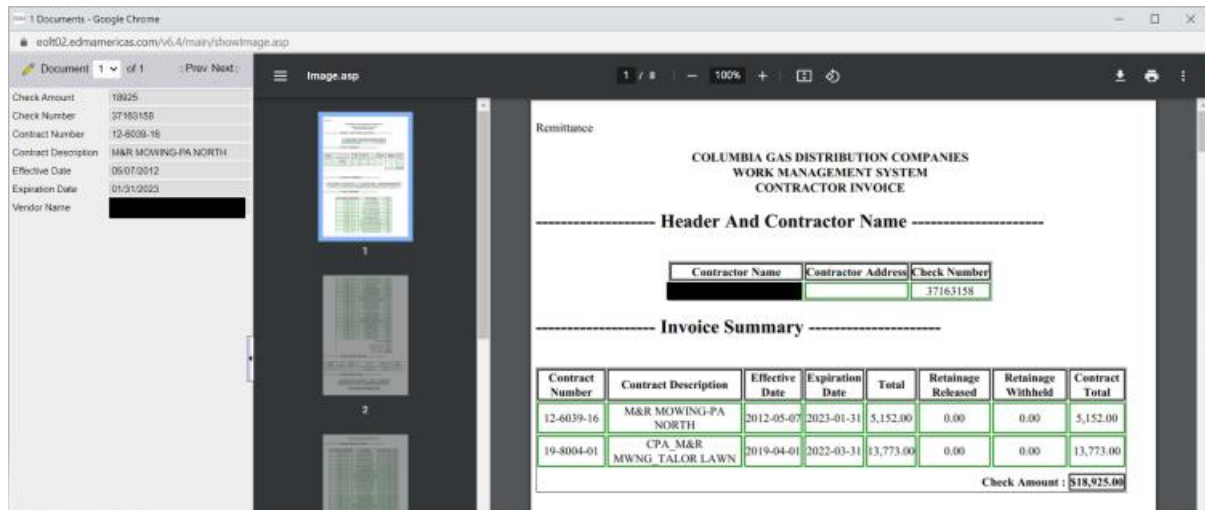


The document window will display the document using the viewer that has been configured for the document file format by your site administrator.

> In EDM online it is possible to configure different Document Viewers for each file type to enable your organisation to control how documents are displayed and the functionality available.
>
> The built-in EDM Viewer is available for most common file formats (PDF, Microsoft Office, Image files etc).

If you have the **View Index Data**, **Comment** or **Edit Data** access rights, then in addition to seeing the Document, you will also see a pane on the left-hand side of the window containing the index fields for the document (i.e. data that has been captured or stored against the document) and also other functions that you can perform as covered in the following sections.

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3 It is possible for your site to be configured to open documents in the main window rather than as popups but this is a site settings for all Users and Document Types.

## 4.4. Opening Multiple Documents

From the **Search Results** page it is possible to open multiple documents at once using **Open Selected**.

Using the **Open Selected** feature is useful particularly in cases where you need to work through a list of Search results or in a Queue.

This is done by selecting the documents to view using the checkboxes alongside each one in the Search Results (or using the **Select all** icon at the top) and then selecting **Open Selected** from the **Options** menu at the bottom of the window.
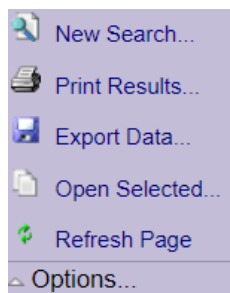
When this is done the first selected document will open in a new window as normal, however, at the top of the Index Data pane on the left of the window there will be additional controls for moving between the selected documents.

You can move to the next document or previous document using the **Next** and **Prev** buttons, or alternatively jump to any of the selected documents using the dropdown list.
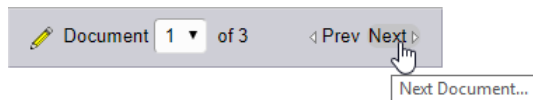
Note that when you **Save** a document (see **Error! Reference source not found. Error! Reference source not found.** below) the site may be configured to automatically move you to the next document making it very efficient to work through a list of documents.

## 4.5.    Further Document Viewing Features
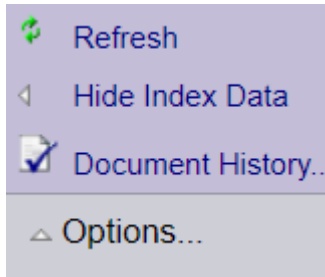
Whilst viewing a document there are some additional features available in the **Options** menu at the bottom left of the Document window4.

The options shown will depend on your user permissions and the configuration of your site but can include the following:

**Refresh** simply reloads the Index Data fields to their saved values.

**Hide Index Data** hides the Index Data pane to maximise the amount of space available to view the document. It can be displayed again using the button that is shown in its place.

**Document History** shows a popup window containing the audit trail of all activity for the document. This will show every time the document has been viewed or any data modified against it.
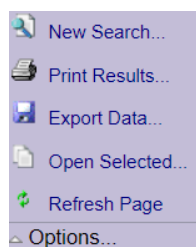
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4 These features are only available when the Index Data pane is displayed.

# 5. Other Functions

## 5.1. Exporting Data

Data associated with one or more documents can be exported to data files suitable for importing into other systems and applications such as CSV and XML.

From the Search Results screen, select **Export Data** from the **Options** menu.



Users must have the **Export Data** access right to see and use this feature.

A popup dialog will be show with the options that are available to export the data such as the output file format (CSV, XML, TXT) and additional fields that are available to be included in the results.
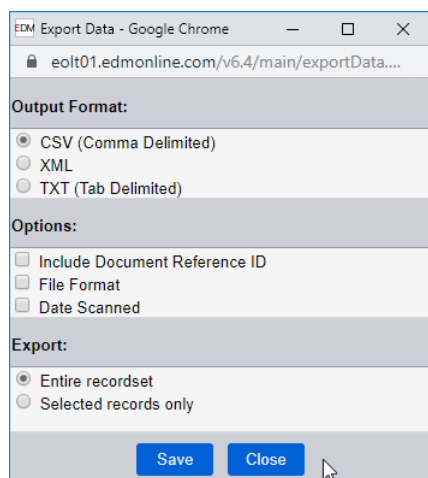


To export a file suitable for opening in Microsoft Excel (as well as many other applications), the CSV format is the easiest option. This will produce a file where each record (document) from the results will be given on new line and each data field for each document will be separated with commas.

You can export data for a limited result set by using the checkboxes next to each document on the results screen and using the **Selected records only** option under Export.

# 6. Appendix One – System Requirements

For optimum security and user experience, EDM recommend using the latest available versions of Microsoft Windows or Internet Browsers (Microsoft Internet Explorer, Microsoft Edge or Google Chrome).

|  | Minimum | Recommended | Notes |
|---|---|---|---|
| Desktop Operating System | Microsoft Windows 7 (32-bit) | Microsoft Windows 10 (64-bit) |  |
| Memory | 32-bit OS = 1Gb<br><br>64-bit OS = 2Gb | 4Gb or above |  |
| Screen Resolution | 1024x768 | 1366x768 or above |  |
| Internet Browser | Microsoft Internet Explorer 9 *<br><br>Google Chrome<br><br>Microsoft Edge | Microsoft Internet Explorer 11<br><br>Google Chrome<br><br>Microsoft Edge |  |

* Microsoft ended support for all versions of Internet Explorer prior to 11 in Jan 2016
EDM online will work on other platforms and non-specified browsers such as iOS / Safari including Mobile Phones and Tablets but EDM do not currently guarantee all functionality.