ECM Soils Document Manager
User's Guide
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1 WHAT IS THE ECM SOILS DOCUMENT MANAGER?

Enterprise Content Management (ECM) is an umbrella term for software that manages files and websites across a large organization. The part of the ECM that is currently developed for NRCS Soil Science Division is the Soils Document Manager (SDM). The document manager is a repository for documents. More precisely, it is a configurable, commercial application that runs on hardware at the USDA National Information Technology Center. “Soils document manager” can be expanded as follows.

Soils.—NRCS Soil Science Division and NRCS soil scientists working in technical soil services.
Document.—Electronic files; for example, JPG, DOCX, PDF, and PPTX files.
Manager.—Ability to store, index, maintain versions, control access, share, and publish.

The paramount objectives of the document manager are (1) to expand the range of information that can be delivered over the Web Soil Survey and (2) to improve document management for NRCS Soils operations. The document manager will be used to share files within Soils and to track quality assurance for online distribution. The first phase of software development (FY–17) built the “file cabinet” to store and manage the files. The next phase will connect the file cabinet to NASIS and to the WSS and other online applications.

The document manager is formally the “IBM Content Navigator.” It is commonly referred to as “ECM” or “Enterprise Content Management.” This is somewhat misleading. Document management is just one part of Enterprise Content Management.

The document manager is not fully intuitive. If you try to use it without training, you will likely have significant problems. The document manager looks a lot like Windows or SharePoint, but it is different in surprising ways. For example, the document manager does not have a recycle bin, closes if you press the back button on your browser, allows you to create content that you can’t delete, and opens files in ways you may not expect. At the very least, you should read Best Practices before trying to use the document manager.

1.1 WHAT IS THE DOCUMENT MANAGER USED FOR?

The document manager can be used for managing files and coordinating work. It is configured dominantly for employees of the Soil Science Division (SSD), for State soil scientists, and for other NRCS employees who are working on soil survey and technical soil services (TSS). File management includes storing, indexing, retrieving, maintaining versions, controlling security, sharing, and publishing. Coordination includes creating “workflows” that notify people about a project and track their response.

The document manager is intended to hold files that need to be:

- Collaborated on
  - Including files that need a documented review.
    - E.g., team reports, special studies, and projects.
• Shared within a region or branch
  o Including files that are of interest primarily within a region or branch.
    ▪ E.g., guidance documents, business plans, training materials, presentations, and maps.
• Shared across the Division
  o Including files that are of broad interest.
    ▪ E.g., photographs, standards, research results, and methods manuals.
• Published
  o Including any files that are delivered to the public. Delivery can be by print, webpage, or web application, such as the Web Soil Survey.
    ▪ E.g., block diagrams, soil survey manuscripts, taxonomic unit descriptions, authored map unit descriptions, authored ecological site descriptions, and books.
• Archived
  o Including files that are of long-term value internally but are not intended for publication.
    ▪ E.g., correlation documents, trip reports, and field notes.

Basically, the document manager is intended for files that will be used by more than one person.

**Do not place personally identifiable information (PII) into the document manager.**

The document manager is not intended to replace NASIS, WSS, SSURGO, eDirectives, or ESIS/EDIT.

### 1.1.1 Managing Files

**Store.**—Files are uploaded through a process that adds metadata, permissions, and other properties. See How do I upload a file?

**Index.**—Files are organized by metadata and folders. When you copy a file into the document manager, you can add metadata about the file. Examples of metadata include keywords, latitude and longitude, captions, and record management codes. The metadata fields that you can chose are determined by the “document class.” The term "properties" is also used to describe the metadata. See How do I select an appropriate entry template for a document class? In addition to metadata that you enter, the system adds properties such as file size, date added, and version number.

**Retrieve.**—You can find files using two types of search: a search on metadata or a search on text content. See How do I search for a file?

**Maintain versions.**—The system stores and numbers previous versions of files. It differentiates between minor versions, which are works in progress, and major versions, which are ready for distribution. See How do I use versions?

**Control security.**—The document manager is installed entirely within the USDA infrastructure. Permissions are controlled using groups based on our email groups.

**Share.**—You can decide who gets to read, edit, or delete your files. There are some constraints. See What are permissions?
Publish.—The system includes a workflow that can be used to gain approval to publish a file online. See What are workflows?

1.1.2 Coordinating Work

Workflows.—A workflow is a documented set of reviews for a file. For example, a regional director could set up a workflow in which all of the party leaders in the region are requested to comment on a business plan. The workflow would notify the party leaders and track their responses. In another example, a party leader could set up a workflow in which a file is approved or rejected by the head of a technical committee and then approved or rejected by a senior regional soil scientist. Approvals, rejections, and document versions are all tracked, and members of the workflow can be automatically notified of changes by email.

Teamspaces.—You can create a “teamspace” to collaborate across business units or otherwise work outside of the fixed folder hierarchy. A teamspace can be broadly thought of as a detached folder.

1.2 WHEN SHOULD I USE DOCUMENT MANAGER INSTEAD OF SHAREPOINT?

The main advantage of the document manager is that it can record and search on metadata and content. Use the document manager whenever you want others to be able to find your content without you telling them where it is.

The document manager is expected to eventually hold:

- All shared Soil Science Division (SSD) content that is not in a database.
- Every SSD publication.
- Every SSD technical document that is appropriate to share.
- Files that are delivered by the WSS.

1.3 WHAT WILL THE DOCUMENT MANAGER BE USED FOR IN THE FUTURE?

The next phase of development will be to deliver content to webpages and to web applications, such as Web Soil Survey. This phase will include some integration with NASIS. Other enhancements may include expanded sharing capacity; report generation using modular text (such as the custom reports in the Web Soil Survey); and integration with other tools, such as eDirectives and the lab database.
2  **How do I access the document manager?**

Step 1: Go to the URL provided by your local system administrator or by the Soils Hotline (SoilsHotline@lin.usda.gov or 402-437-5379).

Step 2: Login using your USDA eAuthentication ID and password.

You must be authorized to login. All employees of the Soil Science Division (SSD) will be authorized.

You must be on the USDA network, either directly or by VPN.

Contact the Soils Hotline (SoilsHotline@lin.usda.gov or 402-437-5379) for assistance.
3  **HOW DO I USE THE DOCUMENT MANAGER?**

The document manager opens as a tab in your web browser (e.g., Internet Explorer). If you click the back button in your browser, you will leave the document manager and must login to return. You may want to hide the browser bar (by pushing F11 on your keyboard). Hiding the browser bar prevents you from accidentally hitting the back button.

### 3.1 **VIEW COLUMN AND TOP BAR**

The far left vertical column (gray) and the top horizontal bar (purple) are available in all views in the document manager. The other elements change depending on which view you select from the far left column. The following image shows the Browse view. The far left column has six buttons to change the view. The top bar includes a log out menu, a document management menu, and a help button.

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The Soils Document Manager in Browse view. The far left column has six buttons to change the view. The top bar includes a log out menu, a document management menu, and a help button.
3.1.1 View Column
The far left column in the manager has buttons to bring up the following views: Home, Browse, Search, Work, Entry Templates, and Teamspaces. This column appears in all views.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Home</td>
<td>This button takes you to your favorites. Designating folders as favorites simplifies the use of the system. This button also shows you a list of files you have checked out.</td>
</tr>
<tr>
<td>Open Browse View</td>
<td>This button takes you to the entire folder structure. Open the USDA and NRCS folders to get to the Soils folders.</td>
</tr>
<tr>
<td>Open Search View</td>
<td>This button takes you to the search functions.</td>
</tr>
<tr>
<td>Open Work View</td>
<td>This button takes you to workflows.</td>
</tr>
<tr>
<td>Open Entry Templates View</td>
<td>This button takes you to the Entry Template Manager.</td>
</tr>
<tr>
<td>Open Teamspaces View</td>
<td>This button takes you to teamspaces and teamspace templates.</td>
</tr>
</tbody>
</table>
3.1.2 Top Bar
The top bar includes a log out menu, a document management menu, and a help button.

3.1.2.1 Log Out Menu
The menu by your name includes the option to log out of the system. As a courtesy to other users and to improve security, please log out at the end of your session.

The menu also includes options for changing the language used in the application.

3.1.2.2 Document Management Menu
The menu represented by three horizontal lines provides one of the methods for adding documents and folders.
3.1.2.3 **Help Menu**
The help button returns information on the Soils Document Manager.

![Help Files](image)

**Contents**:
- **1. What is the ECM-SDM?**
  - What is the SDM used for?
  - When should I use SDM instead of SharePoint?
  - What will the SDM be used for in the future?
- **2. How do I access the SDM?**
- **3. How do I use the SDM?**
  - View Column and Top Bar
  - Home View
  - Browse View
  - Search View
  - Entry Templates View
  - Teamspaces View
- **4. What are permissions?**
  - What are permission groups??
  - What is the SDM folder structure?

3.2 **HOME VIEW**
The Home View has two different layouts: Favorites and My Checkouts. The layouts are selected from the tabs on the horizontal bar across the top.

![Home View](image)
3.2.1 Favorites
The document manager is large and complex. If you use it regularly, you will want to designate favorites so that you don’t have to sort through all the layers to find your content. You can add a file or folder to your favorites by right-clicking it in the Browse View and selecting Add to Favorites.

![Diagram showing how to add to favorites](image)
Following is an image in which the **Home View, Favorites** tab, is selected. The various sections are colorized. Three folders have been added as favorites.

The left (yellow) and middle (salmon) panes function similarly to Windows in that you can view and select folders, subfolders, and files. The right pane (orange) shows the properties of the item selected in the middle pane. The tiny gray triangles between panes allow you toggle the panes open and closed.

The middle (blue) button bar provides features for working with the selected item. The right (pink) button bar provides additional layout options for the middle pane. The options are detail view, magazine view, and filmstrip view.

### 3.2.2 My Checkouts

The **My Checkouts** tab of the **Home View** allows you to quickly see what files you have checked out (locked).

Following is an image in which the **Home View, My Checkouts** tab, is selected.
3.3 **BROWSE VIEW**

The **Browse View** is similar to the **Home View, Favorites** tab. The left and middle panes allow you to select content, and the right pane displays the content properties. Above the middle pane is a “breadcrumb trail” that shows the location of the currently selected item. The top button bar provides features for working with the selected item.

![Image of Browse View](image)

### 3.3.1 Top Button Bar

#### 3.3.1.1 Buttons for left pane

- **Refresh.**—Updates your screen. Although the screen refreshes automatically for many changes, it does not refresh quickly and automatically for all changes.
- **Add Document.**—Adds a document to the current folder. See Add Document Button.
- **New Folder.**—Creates a new subfolder at the location indicated in the left pane. See How do I create a folder?

#### 3.3.1.2 Buttons for middle pane

- **Check In.**—Replaces a currently checked out file with a newer version. See How do I check in a file?
- **Check Out.**—Locks a file so that others cannot change it. See How do I check out a file?
- **Properties.**—Shows the metadata and system properties of a file. See How do I edit file properties?
- **Record Properties.**—Currently disabled. This button displays properties related to archiving for the National Archives and Records Administration (NARA).
- **Declare.**—Currently disabled. This button indicates that a file should be archived for the National Archives and Records Administration (NARA).
- **Actions.**—Brings up the menu of actions that you can perform on the content. Actions that you cannot perform are grayed out. This menu can also be brought up by right-clicking on the content in middle pane.
3.3.2 Middle Pane

Left-clicking on a file in the middle pane selects the file. Right-clicking on a file brings up the Actions menu. Double-clicking on a file opens the file in a viewer. Double-clicking on a file does not open the file in your software. For example, double-clicking a DOCX file does not open the file in Microsoft Word. If you want to open the file in your software, you need to download the file. See the Actions menu.

Following is a screenshot of a DOCX file opened in the document manager viewer:

![Screenshot of DOCX file in Document Manager viewer]

For the following OJT assignment:

02-OJT-NCSS_guidelines_components_map_units_documentation.pdf

Understand the NCSS guidelines for components, map units, and documentation.

1. MLRA Soil Survey Office Leader (or other as appropriate) provides the training following the OJT module provided.

2. MLRA SSOL provides the quiz to measure learning.

3. MLRA SSOL should complete the Measurement of Learning pdf form provided.
3.3.3 Right Pane
The right pane displays a thumbnail image of the file at the top. It shows the editable properties and system properties below. The properties can be hidden or revealed by clicking the triangle to the left.

![Right Pane Screenshot]

3.4 Search View
The search view allows you to create, save, and share searches. See [How do I search for a file?](#)
Clicking **New Search** enables the right pane, which has two sections: **Search Criteria** and **Search Results**. Clicking **Search Criteria** or **Search Results** toggles the relevant section open and close.

### 3.5 ENTRY TEMPLATES VIEW

Most users will not need the **Entry Templates View**. It allows you to see the properties of the document entry templates, which are also available in other views.
3.6 TEAMSPACES VIEW

The **Teamspace View** has two different layouts: **Teamspaces** and **Templates**. The layouts are selected from the tabs on the horizontal bar across the top of the view. Teamspaces can be thought of as folders that are not part of the normal folder structure.

3.6.1 Teamspaces

The **Teamspaces** tab allows you to view the teamspaces of which you are a member and to open them by double-clicking. It also allows you to make a new teamspace. A menu of actions is available from the top button bar. See [What are Teamspaces?](#)
3.6.2 Templates

The Templates tab allows you to select a premade teamspace template or create a new template of your own. Templates are used to create a teamspace. See [How do I make or modify a teamspace template?](#)
4 WHAT ARE PERMISSIONS?

Permissions determine who can see folders and files, who can read them, who can edit them, who can change their properties, and who can delete them. Permissions are set by clicking the Properties button and selecting the Security tab.

When you add a document or folder to the system, you become its owner. Within certain constraints, you can specify who has permission to see, read, edit, and delete it. Some groups are automatically added or excluded depending on where the folder or document is added. A new folder inherits the permissions of the folder above it. The top-level folder structure for the document manager is described in What is the document manager folder structure?

You can give permissions to individuals or groups, and you can give different types of permissions to each. For example, you could specify that everyone in your region can read a document but only your supervisor can edit it.

4.1 WHAT ARE PERMISSION GROUPS?

Permission groups are simply lists of individuals. The groups are associated with NRCS email groups and are maintained by system administrators. If you are an NRCS employee, you are a member of more than one group. See What permissions do I have?

The permission groups are related to the process that controls our email groups. The process uses an “Active Directory” (AD). For example, the AD group ARCG-SSD-SSR1-Office includes
all of the employees in Soil Survey Regional Office 1. In general, only regional directors and national leaders can request that an AD group be created, modified, or deleted. You can see the names of the groups under the Security tab when you add a file to the document manager.

**Examples of Permission Groups**

<table>
<thead>
<tr>
<th>Group</th>
<th>Membership</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARCG-SSD-ALL</td>
<td>All employees of Soil Science Division.</td>
</tr>
<tr>
<td>ARCG-SSD-SSR1-ALL</td>
<td>All SSD employees working in Soil Survey Region 1.</td>
</tr>
<tr>
<td>ARCG-SSD-SSR1-Office</td>
<td>SSD employees working in Soil Survey Regional Office 1 (Portland, Oregon).</td>
</tr>
<tr>
<td>ARCG-SSD-SSR1-MSSO-ONT</td>
<td>SSD employees working in MLRA Soil Survey Office 1-ONT (Ontario, Oregon).</td>
</tr>
<tr>
<td>ARCG-SSD-SSR1-ECM-Admin</td>
<td>Employees with administrative permissions for folder SSR1 and subfolders (regional director and designee).</td>
</tr>
<tr>
<td>ARCG-NSSC-NRCS</td>
<td>Employees of the National Soil Survey Center.</td>
</tr>
<tr>
<td>ARCG-NSSC-Interpretations</td>
<td>Employees of the National Interpretations Branch.</td>
</tr>
<tr>
<td>ARCG-TSS-ALL</td>
<td>All NRCS soil scientists who are not members of the Soil Science Division (State soil scientists and resource soil scientists).</td>
</tr>
<tr>
<td>ARCG-OR-TSS</td>
<td>NRCS soil scientists in Oregon who are not members of the Soil Science Division (Oregon State Soil Scientist and resource soil scientists).</td>
</tr>
</tbody>
</table>

You can find out who is in each group by using the “Soils Document Management Active Directory Browser” ([https://ecm.nrcs.usda.gov/SoilsLDAPBrowser/ldapbrowser.jsp](https://ecm.nrcs.usda.gov/SoilsLDAPBrowser/ldapbrowser.jsp)). Click the dropdown menu in the Group Name box, select a group name from the list, and click Get Members. The site uses the term “LDAP,” which is jargon that means something like “the list of groups and members”. (The acronym stands for Lightweight Directory Access Protocol.)
You can also see the members of a group by checking your address book in Outlook. In Outlook, the group names start with “NRCS” instead of “ARCG” but are otherwise similar. They are not necessarily identical. You can find the name of a group for a region by searching on “NRCS-SSD-” in the Outlook Global Address list. Not all of the groups in the address list are in the document manager, but all of the groups in the document manager are in the address list.

Do not use NRCS-SSD-ALL or NRCS-TSS-ALL unless you have approval from NHQ, a regional director, or a national leader.
4.2 What is the Document Manager Folder Structure?

You don't have access to all of the folders in the document manager. By default, all users can read the Open folders and most users can read and write in the Internal folder(s) for one business unit. The following graphic illustrates the upper-level folders. The owner of each folder is responsible for ensuring that subfolders are added in an orderly manner.

**Structural Folders for Document Manager**

(Gray folders are for administrators only. Light blue folders can be read by all users, but only a few users can add to these folders. White folders are restricted to members of the region or business unit.)

<table>
<thead>
<tr>
<th>Root Level 1</th>
<th>Root Level 2</th>
<th>Root Level 3</th>
<th>Soils Level-1 Folders (Business Units)</th>
<th>Soils Level-2 Folders (Open &amp; Internal)</th>
<th>Soils Level-3 Folders (Subdivisions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>USDA</td>
<td>NRCS</td>
<td>Soils</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>NHQ</td>
<td>NHQ Open</td>
<td>NHQ Internal</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>NSSC</td>
<td>NSSC Open</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Director</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Ecological Sites</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Interpretations</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Research and KSSL</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Business Systems</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Standards</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SSR-##, where ## is the region number</td>
<td>SSR-## Open, where ## is the region number</td>
<td>SSR-## Internal, where ## is the region number</td>
<td></td>
<td>SSRO-##, where ## is the region number</td>
<td>##-XYZ, where ## is the region number and XYZ is the MSSO abbreviation (for example, 10-ALB)</td>
</tr>
<tr>
<td>Repeat with all SSRs</td>
<td>Repeat with all SSRs</td>
<td>Repeat with all SSRs</td>
<td>Repeat with all SSRs</td>
<td>Repeat with all SSROs and MSSOs</td>
<td></td>
</tr>
<tr>
<td>TSS</td>
<td></td>
<td></td>
<td>TSS Open</td>
<td>TSS National</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TSS National</td>
<td>TSS xx, where xx is State (for example, TSS AK)</td>
<td>Repeat with all States, DC, &amp; Caribbean (CB); Hawaii is designated by PI instead of HI</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Repeat with all States, DC, &amp; Caribbean (CB); Hawaii is designated by PI instead of HI</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>TSS Internal</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>TSS National</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>TSS xx, where xx is State</td>
<td>Repeat with all States, DC, &amp; Caribbean (CB); Hawaii is designated by PI instead of HI</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Repeat with all States, DC, &amp; Caribbean (CB); Hawaii is designated by PI instead of HI</td>
<td></td>
</tr>
</tbody>
</table>
The folders in the graphic above are the permanent structural folders. You cannot delete or change them. If you own one of the structural folders, you can add subfolders.

The root folders are used to maintain a common hierarchy for ECM development across USDA. You cannot change or add to these folders. The root folders are USDA, NRCS, and Soils.

The Soils level-1 folders provide an easily understandable organizational structure. You cannot change or add to these folders. The Soils level-1 folders are NHQ, NSSC, TSS, SSR-1, SSR-2, etc.

The Soils level-2 folders divide level-1 into open and internal. For example, there is an “NHQ Open” folder and an “NHQ Internal” folder. Note that “Open” means “Open to be read by all users of the document manager” and “Internal” means “Internal to this business unit.” For example, NHQ Open can be seen by anyone on the document manager, and NHQ Internal can be seen only by employees at NHQ. (See What are permissions?)

The Soils level-3 folders provide further organization. Level-3 folders exist for each Soil Science Division branch, regional soil survey office, MLRA soil survey office, and State (for TSS).

Teamspaces are folders that you can add outside of the structural hierarchy. They are intended for restricted sharing and special projects. See What are Teamspaces?

### 4.3 Permissions for Files

Files have four generic levels of access. These levels are described as roles: owner, author, reader, and no access. You have different roles for different files. Note that “author” refers to people who have permission to change a file, not necessarily to the person who wrote the content. The generic levels can be modified.

<table>
<thead>
<tr>
<th>If your role is…</th>
<th>You can…</th>
<th>You cannot…</th>
</tr>
</thead>
<tbody>
<tr>
<td>No access</td>
<td>Do nothing with the file.</td>
<td>See that the file exists.</td>
</tr>
<tr>
<td>Reader</td>
<td>View the document and its properties. Download the file.</td>
<td>Change the document or its properties.</td>
</tr>
<tr>
<td>Author</td>
<td>View and change the document and its properties.</td>
<td>Delete the file or change its permissions.</td>
</tr>
<tr>
<td>Owner</td>
<td>View and change the document, its properties, and permissions. Delete the document.</td>
<td></td>
</tr>
</tbody>
</table>

---

1 Business unit: An administrative group within NRCS used to organize document ownership. Examples include the 12 soil survey regions, SSD NHQ, the Standards Branch, the Kellogg Soil Survey Laboratory, Technical Soil Services, and the Interpretations Branch.
More specifically, the permissions for files are:

<table>
<thead>
<tr>
<th>Owner</th>
<th>Author</th>
<th>Reader</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage permissions</td>
<td>Edit major version</td>
<td>View document</td>
</tr>
<tr>
<td>Delete document</td>
<td>Edit minor version</td>
<td>View properties</td>
</tr>
<tr>
<td>Edit major version</td>
<td>Edit properties</td>
<td></td>
</tr>
<tr>
<td>Edit minor version</td>
<td>View document</td>
<td></td>
</tr>
<tr>
<td>Edit properties</td>
<td>View properties</td>
<td></td>
</tr>
<tr>
<td>View document</td>
<td>View properties</td>
<td></td>
</tr>
<tr>
<td>View properties</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 4.4 Permissions for Folders

Folders have four generic levels of access. These levels are described as roles: owner, author, reader, and no access. The permissions granted by role are listed below. When you add a subfolder, the roles are copied from the folder to the subfolder.

Note that file permissions and folder permissions are separate. For example, you can be a reader for a folder but not for the files in the folder. As with files, you have different roles for different content.

<table>
<thead>
<tr>
<th>If your role is...</th>
<th>You can...</th>
<th>You cannot...</th>
</tr>
</thead>
<tbody>
<tr>
<td>No access</td>
<td>Do nothing with the folder.</td>
<td>See that the folder exists.</td>
</tr>
<tr>
<td>Reader</td>
<td>View the folder, its content, and its properties.</td>
<td>Add to the folder. Change its properties or permissions.</td>
</tr>
<tr>
<td>Author</td>
<td>View the folder, its content, and its properties. Add files.</td>
<td>Delete the folder, change its permissions, or add subfolders.</td>
</tr>
<tr>
<td>Owner</td>
<td>View the folder and its content. View and change its properties and permissions. Add files and subfolders. Delete the folder.</td>
<td></td>
</tr>
</tbody>
</table>

More specifically, the permissions for folders are:

<table>
<thead>
<tr>
<th>Owner</th>
<th>Author</th>
<th>Reader</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage permissions</td>
<td>Add to folders</td>
<td>View properties</td>
</tr>
<tr>
<td>Delete folder</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit properties</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create subfolders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add to folders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View properties</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4.4.1 What are structural folders?
The upper-level folders are different from normal folders. They are designated as “structural.” In general, structural folders can be changed only by a system administrator.

The upper hierarchy of the document management system is static. It consists of structural folders that have restricted rights. It is not possible, for example, to delete the “NSSC” folder or the “SSR-1” folder. If you are the owner of a structural folder, you won’t have the same permissions as you would with a normal folder.

<table>
<thead>
<tr>
<th>If your role is…</th>
<th>You can…</th>
<th>You cannot…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner of a structural folder</td>
<td>View and change the folder, its content, and its properties. Add files and subfolders.</td>
<td>Delete the folder. Manage the permissions on the folder.</td>
</tr>
</tbody>
</table>

More specifically, the permissions for structural folders are:

<table>
<thead>
<tr>
<th>Owner</th>
<th>Author</th>
<th>Reader</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit properties</td>
<td>Add to folders</td>
<td>View properties</td>
</tr>
<tr>
<td>Create subfolders</td>
<td>View properties</td>
<td></td>
</tr>
<tr>
<td>Add to folders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View properties</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4.5 What permissions do I have?
When you add a new file or folder to the document manager, you are the owner of the file or folder. You can pick additional owner(s), author(s), and reader(s). Files and folders have separate permissions. If you give someone permission to see a file, that person can find it with the search function, even if they cannot see the folder it is in.

The permanent structural folders (NSSC, NHQ, SSR-1, SSR-1/Open, SSR-1/Internal, SSR-2, etc.) have fixed permissions. In general, you can see all of the open folders on the system and the internal folders for your business unit. You can only add subfolders in a folder you own. Structural folders can be deleted only by a system administrator.

General Permissions by Position

<table>
<thead>
<tr>
<th>If you are a…</th>
<th>By default you can…</th>
<th>In…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field soil scientist in Soil Science Division</td>
<td>Read files</td>
<td>Your region’s internal folder. All open folders.*</td>
</tr>
<tr>
<td>Read and add files</td>
<td>Your field office’s folder.</td>
<td></td>
</tr>
<tr>
<td>Assign permissions</td>
<td>Files you upload and folders you create.</td>
<td></td>
</tr>
</tbody>
</table>
### General Permissions by Position

<table>
<thead>
<tr>
<th>If you are a...</th>
<th>By default you can...</th>
<th>In...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member of a regional soils office</td>
<td>Read files</td>
<td>All open folders.*</td>
</tr>
<tr>
<td></td>
<td>Read and add files</td>
<td>Your region’s internal folder. The field office folders in your region.</td>
</tr>
<tr>
<td></td>
<td>Assign permissions</td>
<td>Files you upload and folders you create.</td>
</tr>
<tr>
<td>Regional director</td>
<td>Read files</td>
<td>All open folders.*</td>
</tr>
<tr>
<td></td>
<td>Read and add files</td>
<td>All folders in your region’s structure. (Your region’s internal and open folders. The field office folders in your region.)</td>
</tr>
<tr>
<td></td>
<td>Approve files for publication</td>
<td>Your region’s website (and eventually Web Soil Survey).</td>
</tr>
<tr>
<td></td>
<td>Assign permissions</td>
<td>All folders in your region. Files you upload and folders you create.</td>
</tr>
<tr>
<td>Field soil scientist in Technical Soil Services</td>
<td>Read files</td>
<td>Your State’s TSS folder. The TSS internal folder. All open folders.*</td>
</tr>
<tr>
<td></td>
<td>Read and add files</td>
<td>Subfolders of your State’s TSS folder.</td>
</tr>
<tr>
<td></td>
<td>Assign permissions</td>
<td>Files you upload and folders you create.</td>
</tr>
<tr>
<td>State soil scientist</td>
<td>Read files</td>
<td>The TSS internal folder. All open folders.*</td>
</tr>
<tr>
<td></td>
<td>Read and add files</td>
<td>Your State’s TSS folder and subfolders.</td>
</tr>
<tr>
<td></td>
<td>Assign permissions</td>
<td>All subfolders in your State’s TSS folder. Files you upload and folders you create.</td>
</tr>
<tr>
<td>National Leader for TSS</td>
<td>Read files</td>
<td>All open folders.*</td>
</tr>
<tr>
<td></td>
<td>Read and add files</td>
<td>All TSS folders. (The TSS internal and open folders. All State TSS folders.)</td>
</tr>
<tr>
<td></td>
<td>Assign permissions</td>
<td>All TSS folders. Files you upload and folders you create.</td>
</tr>
<tr>
<td>Employee of the NSSC</td>
<td>Read files</td>
<td>The NSSC internal folder. All open folders.*</td>
</tr>
<tr>
<td></td>
<td>Read and add files</td>
<td>Your branch’s internal folders.</td>
</tr>
<tr>
<td></td>
<td>Assign permissions</td>
<td>Files you upload and folders you create.</td>
</tr>
</tbody>
</table>
## General Permissions by Position

<table>
<thead>
<tr>
<th>If you are a...</th>
<th>By default you can...</th>
<th>In...</th>
</tr>
</thead>
<tbody>
<tr>
<td>National branch leader</td>
<td>Read files</td>
<td>All open folders.*</td>
</tr>
<tr>
<td></td>
<td>Read and add files</td>
<td>All NSSC folders. (The NSSC internal and open folders. All NSSC branch folders.)</td>
</tr>
<tr>
<td></td>
<td>Approve files for publication</td>
<td>Soils.usda.gov and all other forms of publication.</td>
</tr>
<tr>
<td></td>
<td>Assign permissions</td>
<td>All folders in your branch. Files you upload and folders you create.</td>
</tr>
<tr>
<td>Employee at NHQ SSD</td>
<td>Read files</td>
<td>All open folders.*</td>
</tr>
<tr>
<td></td>
<td>Read and add files</td>
<td>The NHQ internal and open folders.</td>
</tr>
<tr>
<td></td>
<td>Assign permissions</td>
<td>Files you upload and folders you create.</td>
</tr>
<tr>
<td>Unit administrator</td>
<td>Access and modify all files, folders, and permissions</td>
<td>Your business unit.</td>
</tr>
<tr>
<td>System administrator</td>
<td>Access and modify all files, folders, and permissions</td>
<td>The document manager.</td>
</tr>
</tbody>
</table>

*The NHQ, NSSC, TSS, and all soil survey regions have open folders that can be read by all authenticated users. The number of people who can add to the open folders is significantly restricted.*
5 HOW DO I ADD CONTENT?

You can only add files to those folders for which you are an owner or author.

You can bring up the Add Document screen several different ways:

- Right-click a folder in the document manager and select Add Document, or
- Click the Add Document button on the top bar, or
- Drag-and-drop from Windows to the document manager.

You cannot drag-and-drop folders.

5.1 HOW DO I CREATE A FOLDER?

Step 1: Click the Browse View icon (on the left menu bar).
Step 2: Navigate to the folder where you would like to create a new folder.
Step 3: Click the New Folder button at the top of the results (middle) pane. An entry template will open.

Step 4: In the Properties section, select a Class. See What are folder classes?
  - Folder creates a generic folder.
  - SOILS Project creates a project folder, which has extra properties and metadata.
Step 5: In the Security section, click Select to pick users and assign roles of owner, author, and reader.
Step 6: Click Add on the right side.
5.1.1 How do I set permissions for a folder?

Step 1: Navigate to a folder for which you are the owner.
Step 2: Right-click the folder and select **Properties**. Edit values of properties.

Step 3: Click the **Security** tab.
- Click **Select** to pick users and assign roles of owner, author, and reader.
5.1.2 What are folder classes?
You can add two types of folders to the document manager: a basic folder and a project folder. Project folders support additional metadata and workflows. Use a project folder if you want to set due dates and track document approvals for an entire folder. When you add a folder to the document manager, you specify the folder class. For a basic folder, select Folder. For a project folder, select SOILS Project Folder.

A folder class is a category for structuring folders. The document manager offers two folder classes.

- The **Folder** class contains the following metadata:
  - Folder name
  - Folder description

- The **SOILS Project** class contains the following metadata:
  - Folder name
  - Folder description
  - Project name
  - Project status
  - User project ID
  - Start date
  - End date
  - Project lead
  - Workflow status
  - Team members
  - Project reviewers
  - Intended distribution
  - Distribution approval code
5.2 HOW DO I UPLOAD A FILE?

5.2.1 Drag and Drop
Step 1: Click the Browse View icon (on the left menu bar).
Step 2: Navigate to the folder where you would like to add a new document.
Step 3: Drag a document from your computer and drop it into the folder.
Step 4: An entry template is displayed.
Step 5: In the General section, select an entry template. See How do I select an appropriate entry template for a document class?
Step 6: In the Properties section, enter the appropriate values for properties and metadata.
Step 7: In the Security section, click Select to pick users and assign roles of owner, author, and reader.
Step 8: Click Add on the right side.

5.2.2 Add Document Button
Step 1: Click the Browse View icon (on the left menu bar).
Step 2: Navigate to the folder where you would like to add a new document.
Step 3: Click the Add Document button at the top of the results (middle) pane.

Step 4: An entry template is displayed.
Step 5: In the General section:
• Select an entry template. See How do I select an appropriate entry template for a document class?
• Click Choose File and select the document you want to add from your computer.
Step 6: In the Properties section, enter the appropriate values for properties and metadata.
Step 7: In the Security section, click Select to pick users and assign roles of owner, author, and reader.
Step 8: Click Add on the right side.
5.2.3 How do I select an appropriate entry template for a document class?

An Entry Template is a form used to collect metadata for a particular document class. See What are document classes? A document class may have several entry templates.

You should select an entry template that includes all of the metadata required for a full description of your document.

Chose from the following six entry templates.

- **Soils Document.**—Basic properties
- **Soils Document with Location.**—Basic properties + location
- **Soil Description with Location.**—Basic properties + soil descriptors + location
- **Publication.**—Basic properties + publishing information
- **Publication with Location.**—Basic properties + publishing information + location
- **Training.**—Basic properties + course information

Following are the entry templates and related metadata. See What is metadata?
### Soils Document
- Project name
- Category
- Record management code
- Keywords
- Description
- Pixel dimensions
- Caption
- Date image taken or created
- Workflow status

### Soils Document with Location
- Project Name
- Category
- Record management code
- Keywords
- Description
- Pixel dimensions
- Caption
- Date image taken or created
- Workflow status
- Country
- State
- County
- Regional Office
- MLRA Soil Survey Office ID
- MLRA
- SSA symbol
- Georeference
  - Latitude
  - Longitude

### Publication
- Project Name
- Category
- Record management code
- Keywords
- Description
- Pixel dimensions
- Caption
- Date image taken or created
- Workflow status
- Intended distribution
- Publication restrictions
- Distribution approval code
- Publication date

### Publication with Location
- Project Name
- Category
- Record management code
- Keywords
- Description
- Pixel dimensions
- Caption
- Date image taken or created
- Workflow status
- Intended distribution
- Publication restrictions
- Distribution approval code
- Publication date
- Country
- State
- County
- Regional Office
- MLRA Soil Survey Office ID
- MLRA
- SSA symbol
- Georeference
  - Latitude
  - Longitude

---

2 Pixel dimensions and workflow status are system properties and are automatically added as appropriate.
### Soil Description with Location
- Project Name
- Category
- Record management code
- Keywords
- Description
- Pixel dimensions
- Caption
- Date image taken or created
- Workflow status
- Order
- Complete taxonomic class
- Component
- Diagnostic criteria
- Intended distribution
- Publication restrictions
- Distribution approval code
- Publication date
- Country
- State
- County
- Regional Office
- MLRA Soil Survey Office ID
- MLRA
- SSA symbol
- Georeference
  - Latitude
  - Longitude

### Training
- Project Name
- Category
- Record management code
- Keywords
- Description
- Pixel dimensions
- Caption
- Date image taken or created
- Workflow status
- Course materials
- Intended Audience
- Category
Depending on the type of document and entry templates associated with a folder, you may choose from one or more entry templates.

5.2.4 How do I set permissions for a document?
Step 1: Navigate to a document for which you are the owner, or add a document.
Step 2: Right-click the document and select **Properties**.
Step 3: Click the **Security** tab.
- Click **Select** to pick users and assign roles of owner, author, and reader.

5.2.5 How do I upload a lot of files?
You can add up to 300 files at a time using standard methods. See [Drag and drop](#) and [Add Document Button](#).

If you need to add more than 300 files at a time, contact the unit administrator for your business unit. The administrator for each business unit has authorization to use the IBM Content Collector (ICC). A spreadsheet is used to document the metadata for the files. The files and the spreadsheet are uploaded to a staging site from which they are transferred into the document manager. For details, see [Batch Uploading Using ICC](#).

5.2.6 What are document classes?
A document class is a category used to structure metadata and organize documents. Permissions, metadata, and workflows are associated with document classes to further enable classification. Document classes can be important when searching for documents based on metadata.

The SOILS Document class is the default class for all Soils documents. All other documents classes are subclasses of the Soils Document class.

Here are the current document classes:
- Soils Document
- Publication
- Soils Description with Location
- Training
5.3 WHAT ARE METADATA AND PROPERTIES?

Metadata provide information about a file or folder. In the document manager, you will see two main types of metadata: “Properties” and “System properties.” Properties can be changed by the owner of a file or folder. Examples include keywords, State IDs, captions, permissions, file names, and record management codes. System properties are generated by the system and are not editable. Examples include file size, creation date, and number of pixels.

When you add a file or folder to the document manager, you can add properties for the file or folder. In some cases, you are required to add properties. You don’t have to fill in all the properties. Keep in mind, however, that the more metadata you add, the more valuable your content becomes. For example, a photo of a soil pit without a caption is essentially useless to anyone but the owner. The same photo with a caption, classification, location, and description can be valuable for the whole Division.

Properties can be used in searches. For example, you could search for all files that have pixels and that have the keyword “Mollisol.” The metadata fields that are available are determined by the document class (See [What are document classes?](#)).

Metadata (properties) that you can add:

- Project Name
- Category
- Record management code
- Keywords
- Description
- Caption
- Date image taken or created
- Intended distribution
- Publication restrictions
- Distribution approval code
- Publication date
- Country
- State
- County
- Regional Office
- MLRA Soil Survey Office ID
- MLRA
- SSA symbol
- Georeference
  - Latitude
  - Longitude
- Order
- Complete taxonomic class
- Component
- Diagnostic criteria
- Course materials
- Intended Audience Category
## Metadata Characteristics

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Maximum number of characters</th>
<th>Values (Only if Type is “List”)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project name</td>
<td>Text</td>
<td>256</td>
<td></td>
<td>Required for project folders. Default is the folder name.</td>
</tr>
<tr>
<td>Category</td>
<td>Multi-Select List</td>
<td>NA</td>
<td>Ecological Site Inventory Imagery Interpretaions &amp; Land Use Lab &amp; Research Policy &amp; Procedure Public Affairs &amp; Education Soil Geography Soil Business Soil Health Soil Mapping Standards &amp; Classification Training Technical Soil Services Other</td>
<td></td>
</tr>
<tr>
<td>Keywords</td>
<td>Text</td>
<td>256</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Text</td>
<td>3,100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caption</td>
<td>Text</td>
<td>3,100</td>
<td>Required for images in Publication Document class.</td>
<td></td>
</tr>
<tr>
<td>Date Taken /Developed</td>
<td>Date &amp; Time</td>
<td>NA</td>
<td></td>
<td>Intended for imagery.</td>
</tr>
<tr>
<td>Intended distribution</td>
<td>List</td>
<td>NA</td>
<td>Not for distribution Internal only National Website Regional Website Web Soil Survey Photo Gallery Publication Press Publication All outlets</td>
<td></td>
</tr>
</tbody>
</table>
### Metadata Characteristics

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Maximum number of characters</th>
<th>Values (Only if Type is “List”)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication restrictions</td>
<td>List</td>
<td>NA</td>
<td>None: Public domain, Contains © material, Contains PII, Unknown</td>
<td>Default is “None: Public Domain.”</td>
</tr>
<tr>
<td>Distribution Approval Code</td>
<td>Multi-Select List</td>
<td>NA</td>
<td>Not for distribution, Internal only, National Website, Regional Website, Web Soil Survey, Photo Gallery Publication, Press Publication, All outlets</td>
<td>Required property where available. Changeable only by Leadership team. Default is “Not distributed.”</td>
</tr>
<tr>
<td>Publication date</td>
<td>Date</td>
<td></td>
<td></td>
<td>Default is “USA.”</td>
</tr>
<tr>
<td>Country</td>
<td>List</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>List</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>County</td>
<td>List</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regional Office</td>
<td>List</td>
<td>SSRO list</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Soil Survey Office ID</td>
<td>List</td>
<td>SSO list</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MLRA</td>
<td>List</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SSA Symbol</td>
<td>Text</td>
<td>5</td>
<td></td>
<td>Two uppercase letters followed by 3 digits.</td>
</tr>
<tr>
<td>Georeference Lat/Long</td>
<td></td>
<td></td>
<td></td>
<td>This property consists of Latitude, Longitude, and Datum.</td>
</tr>
<tr>
<td>Latitude</td>
<td>Number</td>
<td>7 figures after the decimal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Longitude</td>
<td>Number</td>
<td>7 figures after the decimal</td>
<td>In North America, this number should be negative.</td>
<td></td>
</tr>
<tr>
<td>Order</td>
<td>List</td>
<td></td>
<td>Alfisols, Andisols, Aridisols, Entisols, Gelisols, Histosols, Inceptisols, Mollisols, Oxisols, Spodosols, Ultisols, Vertisols</td>
<td></td>
</tr>
<tr>
<td>Complete taxonomic class</td>
<td>Text</td>
<td>256</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Component</td>
<td>Text</td>
<td>256</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diagnostic criteria</td>
<td>Text</td>
<td>256</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Metadata Characteristics

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Maximum number of characters</th>
<th>Values (Only if Type is “List”)</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Course Materials    | List   | NA                           | Course Name
Course Number
OJT
Job Aid
Syllabus
Training Plan
Classroom
Webinar                         |                                                      |
| Intended Audience   | List   | NA                           | NCSS
NRCS
Public
Grades K-6
Grades 7-12
College Level                 |                                                      |
| User Project ID     | Text   | 60                           |                                 | Associated with SOILS Project Folder, not with document classes.       |

#### 5.4 How do I edit file properties?

To see the properties for a file, first select the file in the **Browse** or **Home** view. Next, either click the **Properties** button or right-click the file and select **Properties** from the menu.
The properties window has various tabs, depending on the file and your permissions. The following screenshot shows tabs for **Properties**, **Comments**, **Security**, **Versions**, and **Folders Filed In**. The **Properties** tab is selected, and it has horizontal panes for **Properties** and **System Properties**. Either pane can be opened or closed by clicking the triangle to the left. The **Properties** pane displays the metadata associated with the file that can be changed by a user; for example, keywords. The **System Properties** pane displays information about a file that is generated by the system; for example, the date the file was added to the system.

### 5.4.1 Properties

Properties (also known as “owner-changeable metadata”) can be changed in the **Properties** pane of the **Properties** tab of the **Properties** menu option. Details regarding the properties are listed under [What are metadata and properties?](#). After making changes, you can save or cancel them using the menu in the lower-right corner of the window. (Do not click the back button on your web browser.)
5.4.2 Comments
You can add comments to a document. Select the Comments tab, type your comments into the box at the bottom of the window, and press the Enter key on your keyboard. Note: You do not need to click Save in the lower-right menu. Comments (and comment deletions) are accepted when you press Enter.

Comments can be deleted using the small menu to the right of the comment.
5.4.3 Security
You can change who can see and edit your file from the Security tab. You can add or remove individuals and groups from four roles: owner, author, reader, and no access. In general, an Owner can do anything with a file, an Author can change or delete a file, a Reader can view or download a file, and a person assigned No access cannot see that the file exists. There are some limits on who you can add or remove from a role. For details, see Permissions for Files. Do not add a group to "No access" if you are a member of the group; e.g., never add SSD-ALL.

5.4.3.1 To give permission to a person or group
Under the Security tab, click Select.

The upper-left dropdown menu (image below) allows you to select from Groups or individual Users. Type part of a name in the box and click the search icon. Select a name from the left pane (Available), and click the arrow in the middle to move the name to the right pane (Selected). Choose a role from the lower-right dropdown menu, and click Add or Apply. Click Add to add the selected name to the permissions and close the window. Click Apply to add the selected name to the permissions and leave the window open so you can add more names. Click Close to exit the window.
After a name has been added to a role, click **Save** in the lower right corner to confirm the change.

5.4.3.2 To change permission for a person or group

Under the **Security** tab, click on the name of the person or group whose permissions you want to change. Select the new role and click **OK**.

Notes:

- You can remove yourself as the owner of a file. However, this is highly discouraged. If you do so, you may not be able to add yourself back. You can only add yourself back if you were the person who originally added the file to the document manager.

- Because you are in one or more groups, you can be assigned more than one role for a file. For example, you could have author permissions as an individual and have reader permissions as a member of SSD-All. You receive the permissions of both roles. (See below for the exception in the case of “No access.”)
• The “No access” restriction overrules owner, author, and reader. If you are in a group that is added to “No access," you will lose the ability to view, read, and change the file. You will be able to take yourself out of “No access” only if you originally added the file to the document manager.
• It is possible to **Customize** roles for a document by removing permissions from a role.

### 5.4.4 Versions
When a document is checked in, a new version is saved. These versions are accessed through the **Versions** tab. See [How do I use versions?](#)

The **Actions** dropdown menu provides multiple options.
5.4.5 Folders Filed In
The Folders Filed In tab shows the location of the file in the folder structure.

5.5 How do I use versions?
Step 1: Navigate to a document.
Step 2: Right-click the document and select Properties.
Step 3: Click the Versions tab.

Step 4: Right-click on a version to preview it, download it, or view its properties.

5.5.1 What are the differences between major and minor versions?
A major version is a finished document that is ready for its intended audience. A minor version is a draft. All published documents will be major versions.
5.5.2 What are versions good for?

- Versions ensure that you and others know which copy is the latest.
- Versions let you know if a document is ready.
  - Minor versions are drafts.
  - Major versions are finished.
- Versions track the metadata in an item. You can see who made changes and when the changes were made.
- Versions give you the ability to restore previous versions.
- Versions give you access to previous versions so you can compare files.
- Searches can be restricted to find only major versions.
6 HOW DO I SHARE FILES WITH OTHERS?

The document manager allows several options for sharing content with others. By changing permissions, you can allow others to view, read, download, comment on, edit, or delete content.

6.1 HOW DO I SHARE A FILE WITH EVERYONE IN MY BUSINESS UNIT?

By default, everyone in a unit can see all of the files in the unit.

<table>
<thead>
<tr>
<th>If I want everyone in my business unit to be able to:</th>
<th>I do this:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Read my file</td>
<td>Copy the file into an internal folder.</td>
</tr>
<tr>
<td>Edit my file</td>
<td>Change the permissions on my file to add the group for my unit to the author role.</td>
</tr>
</tbody>
</table>

6.2 HOW DO I SHARE A FILE WITH EVERYONE IN THE DOCUMENT MANAGER?

Contact the unit administrator who has owner permission for the open folder for your unit. Ask them to copy or move the file to the open folder.

Do not use the NRCS-SSD-ALL group unless you have approval from NHQ, a regional director, or a national leader.

6.3 HOW DO I RESTRICT A FILE SO FEWER PEOPLE CAN VIEW IT?

In general, the document manager is intended to share files, not hide them. If you want to prevent specific individuals from seeing content, you can add them to the “No access” role under the Security tab. This also works with groups. Do not apply “No access” to groups that you are a member of. If you want to prevent everyone except specific individuals or groups from seeing content, you can create a teamspace.

Teamspaces.—You can create a teamspace, which has restricted access. Files in a teamspace are visible only to members of the team. See What are teamspaces?

No access.—An individual or group that is added to the no access role for a file or folder will not be able to view or read the file or folder. Note that if you add a group that you are a member of, you will lose the ability to edit the file. Do not use SSD-All or TSS-All in the no access role. Roles are controlled under the Security tab of the content Properties.

---

3 Business unit: An administrative group within NRCS used to organize document ownership. Examples include the 12 soil survey regions, SSD NHQ, the Standards Branch, the Kellogg Soil Survey Laboratory, Technical Soil Services, and the Interpretations Branch.
Note: You have no right of privacy in the system. The system administrators can gain access to all files, including “No access” files.

7 HOW DO I FIND AND ACCESS FILES?

You can search for a file using metadata, text content, or both. You can check a file out or simply download it. You can comment on a file within the document manager.

7.1 HOW DO I SEARCH FOR A FILE?

You can search on metadata, text content, or both.

7.1.1 Metadata Search

One of the most powerful features of the document manager is its ability to search for documents using metadata. For example, you might search for photos of Mollisols that were taken between 1978 and 1983; or you might search for all information related to Lancaster County, Nebraska. As you enter content into the document manager, please remember that better metadata means better search capability.

7.1.1.1 Search (and Save Search)

Step 1: Click the Search View icon (on the left menu bar).
Step 2: Click New Search.
Step 3: Navigate to a folder in the Search in section.
  • In the Class section, use the default or select a specific document class; e.g., Soil Description with Location.
  • Click Add Property and enter appropriate values. Repeat as necessary.
  • Depending on the type of Property (i.e., Text, Date, Choice List, or Number), different operators are available for searching. More information on search operators is provided below.
Step 3: Click Search.
Step 4: If desired, click Save and fill in “Name,” “Description,” and “Folder” to save the search and to specify which users you will share the search with. Click OK. This step saves the query script so that it can be run again.
7.1.1.2 Search Operators: Text

For properties that are Text fields, the available operators are:

- **Starts With.**—The selected property value begins with entered value.
- **Ends With.**—The selected property value ends with entered value.
- **Like.**—The selected property value contains the entered value.
- **Not Like.**—The selected property value does not contain the entered value.
- **Equals.**—The selected property value is equal to the entered value.
- **Not Equal.**—The selected property value is not equal to the entered value.
• **Less Than.**—The selected property value is alphabetically lower in order than the entered value.
  
  - For example, if the documents listed in the folder are Boston.pdf, Lincoln.pdf, NewYorkCity.pdf, and Sacramento.pdf:
    
    **Search property:** Document Title  
    **Search operator:** Less Than  
    **Search value:** Sacramento  
    **Search results:** Boston.pdf, Lincoln.pdf, NewYorkCity.pdf
  
  • **Less Than or Equal.**—The selected property value is alphabetically lower or equal in order than the entered value.

  - For example, if the documents listed in the folder are Boston.pdf, Lincoln.pdf, NewYorkCity.pdf, and Sacramento.pdf:
    
    **Search property:** Document Title  
    **Search operator:** Less Than or Equal  
    **Search value:** Sacramento.pdf  
    **Search results:** Boston.pdf, Lincoln.pdf, NewYorkCity.pdf, Sacramento.pdf
  
  • **Greater Than.**—The selected property value is alphabetically greater in order than the entered value.

  - For example, if the documents listed in a folder are Boston.pdf, Lincoln.pdf, NewYorkCity.pdf, and Sacramento.pdf:
    
    **Search property:** Document Title  
    **Search operator:** Greater  
    **Search value:** Lincoln.pdf  
    **Search results:** NewYorkCity.pdf, Sacramento.pdf
  
  • **Greater Than or Equal.**—The selected property value is alphabetically greater or equal in order than the entered value.

  - For example, if documents listed in a folder are Boston.pdf, Lincoln.pdf, NewYorkCity.pdf, and Sacramento.pdf:
    
    **Search property:** Document Title  
    **Search operator:** Greater than or Equal  
    **Search value:** Lincoln.pdf  
    **Search results:** Lincoln.pdf, NewYorkCity.pdf, Sacramento.pdf
  
  • **Include Any (multiple values).**—The selected property value includes any of the entered values.
  
  • **Exclude All (multiple values).**—The selected property value excludes all of the entered values.
  
  • **Is Empty.**—The selected property value is empty or blank.
  
  • **Is Not Empty.**—The selected property value is not blank.

7.1.1.3 **Search Operators: Choice Lists**
For properties that are Choice Lists, the available operators are:

• **Equals.**—The selected property value is equal to the entered value.

• **Not Equal.**—The selected property value is not equal to entered value.

• **Less Than.**—The selected property value is alphabetically lower in order than the entered value.
• For example, if the choice list for property “Course Materials on Training Documents” has values Classroom, Course Name, Course Number, Job Aid, OJT, Syllabus, Training Plan, and Webinar:
  Search property: Course Material
  Search operator: Less Than
  Search value: Course Number
  Search results: Display of documents that have the property “Course Materials” set to Classroom or Course Name.

• Less Than or Equal.—The selected property value is alphabetically lower than or equal in order than the entered value.
  o For example, if the choice list for property “Course Materials on Training Documents” has values Classroom, Course Name, Course Number, Job Aid, OJT, Syllabus, Training Plan, and Webinar:
    Search property: Course Material
    Search operator: Less Than or Equal
    Search value: Course Number
    Search results: Display of documents that have the property “Course Materials” set to Classroom, Course Name, or Course Number.

• Greater Than.—The selected property value is alphabetically greater in order than the entered value.
  o For example, if the choice list for property “Course Materials on Training Documents” has values Classroom, Course Name, Course Number, Job Aid, OJT, Syllabus, Training Plan, and Webinar:
    Search property: Course Material
    Search operator: Greater Than
    Search value: Course Number
    Search results: Display of documents that have the property “Course Materials” set to Job Aid, OJT, Syllabus, Training Plan or Webinar.

• Greater Than or Equal.—The selected property value is alphabetically greater or equal in order than the entered value.
  o For example, if the choice list for property “Course Materials on Training Documents” has values Classroom, Course Name, Course Number, Job Aid, OJT, Syllabus, Training Plan, and Webinar:
    Search property: Course Material
    Search operator: Greater Than or Equal
    Search value: Course Number
    Search results: Display of documents that have the property “Course Materials” set to Course Number, Job Aid, OJT, Syllabus, Training Plan, or Webinar.

• Include Any (multiple values).—The selected property value includes any of the entered values.

• Exclude All (multiple values).—The selected property value excludes all of the entered values.

• Is Empty.—The selected property value is empty or blank.

• Is Not Empty.—The selected property value is not blank.

7.1.1.4 Search Operators: Multi-Choice Lists
For properties that are Multi-Choice Lists, the available operators are:
• **Include All (multiple values).**—The selected property value contains all of the entered values.

• **Include Any (multiple values).**—The selected property value includes any of the entered values.

• **Exclude All (multiple values).**—The selected property value excludes all of the entered values.

• **Is Empty.**—The selected property value is empty or blank.

• **Is Not Empty.**—The selected property value is not blank.

### 7.1.1.5 Search Operators: Date

For properties that are **Date** fields, the available operators are:

• **Equals.**—The selected date property value is equal to the entered date value.

• **Not Equal.**—The selected date property value is not equal to entered date value.

• **Less Than.**—The selected date property value is earlier than the entered date value.
  
  o For example:

  - *Search property:* Modified On
  - *Search operator:* Less Than
  - *Search value:* 8/1/2017
  - *Search results:* Display of documents that were modified before 8/1/2017

• **Less Than or Equal.**—The selected date property value is earlier than or equal to the entered date value.
  
  o For example:

  - *Search property:* Modified On
  - *Search operator:* Less Than or Equal
  - *Search value:* 8/1/2017
  - *Search results:* Display of documents that were modified on or before 8/1/2017

• **Greater Than.**—The selected date property value is later than the entered date value.
  
  o For example:

  - *Search property:* Modified On
  - *Search operator:* Greater Than
  - *Search value:* 8/1/2017
  - *Search results:* Display of documents that were modified after 8/1/2017

• **Greater Than or Equal.**—The selected date property value is later than or equal to the entered date value.
  
  o For example:

  - *Search property:* Modified On
  - *Search operator:* Greater Than or Equal
  - *Search value:* 8/1/2017
  - *Search results:* Display of documents that were modified on or after 8/1/2017

• **Between (2 dates).**—The selected date property value is between the 2 entered date values.

• **Not Between (2 dates).**—The selected date property value is not between the 2 entered date values.

• **Include Any (multiple dates).**—The selected date property value is equal to any of the entered date values.
• **Exclude All.**—The selected date property value is not equal to any of the entered date values
• **Is Empty.**—The selected date property value is empty or blank.
• **Is Not Empty.**—The selected date property value is not blank.

7.1.1.6 **Search Operators: Integers (Numbers)**
For properties that are **Integer (number)** fields, the available operators are:

• **Equals.**—The selected property value is equal to the entered value.
• **Not Equal.**—The selected property value is not equal to entered value.
• **Less Than.**—The selected property value is numerically less than the entered value.
• **Less Than or Equal.**—The selected property value is numerically less than or equal to the entered value.
• **Greater Than.**—The selected property value is numerically greater than the entered value.
• **Greater Than or Equal.**—The selected property value is numerically greater than or equal to the entered value.
• **Between (2 values).**—The selected property value lies between the 2 entered values.
• **Not Between (2 values).**—The selected property value does not lie between the 2 entered values.
• **Include Any (multiple values).**—The selected property value is equal to any of the entered values.
• **Exclude All.**—The selected property value is not equal to any of the entered values.
• **Is Empty.**—The selected property value is empty or blank.
• **Is Not Empty.**—The selected property value is not blank.

7.1.2 **What can I do with the search results?**
The search produces a list of files and metadata. Any function you can perform from the **Browse** view you can also perform from the **Search Results**. For example, you can view or check out a file. You can also export search results, which can be useful for analysis and identification of trends. For example, you could use the results to answer such questions as: How many training documents were added between certain dates; how many publication documents are images; and how many images are missing a caption?

If your search produces an unusably long list, you can narrow your search by adding additional criteria.

7.1.2.1 **Sort and Export the Metadata**
Step 1: Click the **Search View** icon (on the left menu bar).
Step 2: Click **New Search**.
Step 3: Navigate to a folder in the **Search in** section.
  • In the **Class** section, use the default or select a specific document class; e.g., **Soil Description with Location**.
  • Click **Add Property** and enter appropriate values.
Step 3: Click **Search**.
Step 4: In the **Search Results** section, select the files for which you would like to export metadata.
Step 5: Click **Actions** and **Export**.
Step 6: Select all metadata and properties that you would like to export and click **Export**.

7.1.3 **Content Search**
You can search on the text content of files in the document manager. Examples of file types you can search in are PDF, DOCX, PPTX, TXT, and HTM. Words that are part of an image are not searchable.
The text search is not case sensitive. If you search for Drain it will find also drain.

The text search ignores punctuation following a word in a document. For example, if you search for drain it will also find drain; and drain.

The text search can find words that are similar to the word you are searching for, but it is somewhat unpredictable. For example, searching for drain will find drain, drains, and drained but will not find drainage. For better precision, use quotation marks and wildcards as described below.

Step 1: Click the Search View icon (on the left menu bar).

Step 2: Click New Search.

Step 3: Navigate to a folder in the Search in section.
  - In the Class section, use the default or select a specific document class; e.g., Soil Description with Location.
  - Add a term or phrase in the box below “Find items with the following terms:”.

Step 3: Click Search.

Note: The search results include only documents for which you have owner, author, or reader access. If your security role is “No Access” for a document, the document will not be displayed.

Step 4: In the Search Results section, you may select the files for which you would like to export metadata.

Step 5: Click Actions and Export.

Step 6: Select all metadata and properties that you would like to export and click Export.

7.1.3.1 Content Search Criteria
  - A combination of terms and operators can be used.
  - You also have an option to select Text Options:
    - All of the terms.—Search results will display documents that contain all of the terms.
      For example, if the terms Soil Survey are entered, the search will find all documents that have both the term Soil and the term Survey in them.
- **Any of the terms.**—Search results will display documents that contain any of the terms. For example, if the terms Soil Survey are entered, the search will find all documents that have either the term Soil or the term Survey in them.

- **Within proximity of words.**—Search results will display documents that contain the terms within a certain range of words. For example, your search terms are Soil Survey and **Within proximity of words** is set to 10. The search results will display documents that have the terms Soil and Survey within 10 words of each other.

- **Advance Operators.**—Search can include terms to exclude using the minus sign (–). For example, if your search terms are Soil –Survey, search results will display documents that contain the term Soil and do not contain the term Survey.

- If you want to search for an exact phrase, you need to enter the terms in quotes (""). For example, if “Soil Survey” is entered in quotes, the search will find all documents that have the terms Soil Survey together.

- The wildcard characters available are asterisk (*) and question mark (?). The wildcards will function either with or without quotes.
  - The asterisk represents zero or more characters. If your search term is special*, then the search results will display documents that have the terms special, specials, specialty, specialist, etc.
  - The question mark represents only one character. If your search term is special?, then the search results will only display documents that have one character after the term special, such as the term specials.
    - If your search term is special???, then the search results will only display documents that have 3 characters after the term special, for example, the term specialist.
## Examples of Search Results

<table>
<thead>
<tr>
<th>Searching for…</th>
<th>will find…</th>
<th>will not find…</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Search is not case sensitive.</strong></td>
<td>drain</td>
<td>Drain</td>
</tr>
<tr>
<td><strong>Search ignores punctuation at the end of words.</strong></td>
<td>drain</td>
<td>drain. drain, drain; drain? drain: drain- drain-field</td>
</tr>
<tr>
<td><strong>Search finds some similar words.</strong></td>
<td>drain</td>
<td>drains drained</td>
</tr>
<tr>
<td><strong>Quotation marks eliminate the search for similar words.</strong></td>
<td>“drain”</td>
<td>Drain</td>
</tr>
<tr>
<td><strong>Quotation marks force the word order to be as specified.</strong></td>
<td>“drain pipe”</td>
<td>Drain pipe</td>
</tr>
<tr>
<td><strong>Asterisk (*) stands for zero or more characters.</strong></td>
<td>drain*</td>
<td>Drain</td>
</tr>
<tr>
<td><strong>Question mark stands for exactly 1 character</strong></td>
<td>drain?</td>
<td>Drains</td>
</tr>
<tr>
<td></td>
<td>drain??</td>
<td>Drained</td>
</tr>
</tbody>
</table>
7.2 HOW DO I CHECK OUT A FILE?
If you want to edit a file, use Check Out and Download.

When you check out a file, you lock it so no one else can change it. When you check the file back in, you unlock it. Check out is used to prevent a file from being changed unknowingly by more than one person. It can also be used simply to prevent changes by other users.

If you choose Check Out and Download, a copy of the file is downloaded onto your local computer and the file in the document manager is locked. When you check in a file, the version in the document manager is unlocked and replaced by a file you upload from your computer.

Note that once a file is downloaded onto your computer, the document manager has no connection to the file. Any file can be checked back in as the newer version. Consider the following example. You check out and download file ABC.docx. You could then check in and upload file CDE.docx; the document manager would treat CDE.docx as a new version of ABC.docx and rename it ABC.docx. Be careful that you check in the correct file.

Step 1: Navigate to the document you would like to check out.
Step 2: Right-click the document:
- Select Check Out and then select either Check Out Only or Check Out and Download.

The download options are:
- Open, Save, Save as, and Save and open.

When in doubt, choose “Save as.”
Open copies the file to a random temporary directory on your computer. If you chose this option, use the “Save as” command in your software instead of the “Save” command. Typically, you would chose Open if you only want to look at the file but not save it or change it.

Save copies the file to the Download folder on your computer.

Save as copies the file to a folder of your choice. Typically, you would chose Save as if you want to keep a copy.

Save and open copies the file to the Download folder on your computer and opens that copy in your software.

7.3 **HOW DO I CHECK IN A FILE?**

You have to check out a file before you can check it back in.

None of the applications on your computer can save directly to the document manager. For example, the “Save” and “Save as” commands in Word, PowerPoint, and PhotoShop can’t make any changes to a file in the document manager.

You can only check files into the Soils Document Manager by using the Soils Document Manager.

Step 1: Navigate to a document that you have already checked out.
Step 2: Right-click the document and click **Check In**.

Step 3: An entry template is displayed.
Step 4: In the **General** section, click **Choose File** and select the version of the document you want to check in from your computer.
Step 5: In the **Properties** section, enter the appropriate values for properties and metadata.
Step 6: Click **Check In** on the right side.
7.4 HOW DO I COMMENT ON A FILE?

7.4.1 Use the Document Properties
Step 1: Navigate to a document.
Step 2: Right-click the document and select Properties.
Step 3: Click the Comments tab.
Step 4: Type in a comment and press the Enter key on your keyboard.
7.4.2 Use the Magazine View
Step 1: Navigate to the folder where the document exists.
Step 2: At the top right corner, click the Magazine View icon. The circle around the icon indicates which view is selected.
Step 3: Click the Comments link on the document.
Step 4: Type in a comment and press the Enter key on your keyboard.

7.4.3 Add a Comment as Part of a Workflow
You can add a comment using the Properties or the Magazine view during a workflow. (See What are workflows?)
8 WHAT ARE TEAMSPACES?

Teamspaces provide a place to organize documents, folders, and searches that are specifically important to a team. You can use teamspaces to organize and share content, facilitate recurring work, and group specific items, such as documents, folders, and searches that are needed for a project.

Teamspaces are made from templates. In general, only administrators create templates. You can, however, modify templates within certain bounds.

8.1 HOW DO I MAKE A TEAMSPACE?

You make a teamspace using a template.

Step 1: Click the Teamspace icon in the far left column.
Step 2: Click **New Teamspace**.

Step 3: Type a name in the **Teamspace name** field.

Step 4: Select a template from the **Available templates** list. In most cases, you can use the **Generic** template. If you need a new template, contact the administrator for your business unit. See [How do I make or modify a teamspace template?](#)

Step 5: Click **Next**.
Step 6: If you want to make additional pre-saved searches available, click New Search and add searches as directed.

Step 7: Click Next.

Step 8: If you want to make additional entry templates available, select from the list and click Add.

Step 9: Click Next.
Step 10: If you want to make additional folders or files available by default, click **New Folder** or **Add Document** and add folders or files as directed.

Step 11: Click **Next**.

Step 12: Click **Add Users and Groups** to pick users and assign roles of owner, member, and reviewer.

Step 13: Click **Finish**.
The new teamspace will appear in the Teamspace View.

8.2 **HOW DO I MAKE OR MODIFY A TEAMSPACE TEMPLATE?**

In general, only administrators make teamspace templates. You will typically use the generic template.

A teamspace template allows a user to:

- Define Roles
- Select Searches
- Select Document Classes or Entry Templates
- Add Folders or Documents
To create a New Search

To add a New or Existing Search

To select an existing Search

Select from existing Entry Templates and Add
Create Folders and Add Documents

Select from existing roles of Owner, Member, and Reviewer

Create new Roles
### New Role

* Role name:
  Advanced Member

Role description:
This role combines some permissions of an Owner and a Member

### Teamspace Template Builder

Selected roles:

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>Assign this role to users who need to manage the teamspace, including access to the teamspace.</td>
</tr>
<tr>
<td>Advanced Member</td>
<td>This role combines some permissions of an Owner and a Member</td>
</tr>
</tbody>
</table>

Permissions for the Advanced Member:

#### Document and Folder permissions:
- Manage permissions
- Delete
- Promote versions
- Edit documents
- Edit properties
- Create subfolders
- Add to folders
- View documents
- View properties
- Teamspace permissions:
  - Add searches
  - Create searches
  - Manage classes or entry templates
  - Manage teamspace users

[Add]
9 WHAT ARE WORKFLOWS?

A workflow is a documented request for actions on a file or folder. A workflow includes a list of deadlines and people who will work on the content. Possible actions include comments, edits, and approval or rejection of content. Emails can be automatically sent showing progress on the workflow. A workflow can schedule actions simultaneously or in sequence.

In its simplest form, a workflow sends requests one person review a file. The request includes a link to the file and asks for approval or rejection. The workflow records the person’s response.

9.1 WHY WOULD I USE A WORKFLOW?

A workflow can be used to organize work and record progress on a file or a project folder.

- Use a workflow if you want to ensure all reviewers are looking at the same copy.
- Use a workflow if you want to record who has reviewed a document and what their comments were.
- Use a workflow if you want to specify who should work on a file and when they should be done.
- Use a workflow if you want to record progress.
- Use a workflow if you want to record approval.
- Use a workflow if you want to receive input from multiple sources.
- Use the publication workflow to record an approval process for publication. Publication can include posting a file to the Web or delivering it via Web Soil Survey.
- Use the Soils Document Workflow to record a quality assurance process that includes a soil data quality specialist or senior regional soil scientist, a technical team, a state soil scientist, and a regional director.

9.2 WHAT WORKFLOWS ARE AVAILABLE?

The four types of workflows that can be launched on documents are:

Generic

1. NDM Sequential Workflow
2. NDM Parallel Workflow

Pre-customized

3. Soils Document Workflow
4. Publication Workflow

The generic National Document Management (NDM) workflows are customizable and may be used on any type of document. They let you assign people to work on the document, specify in what order they receive the document, and list deadlines for when the work is due.

The Soils Document Workflow and the Publication Workflow are pre-customized. They have a defined number of reviewers and milestones. They are preset to work with certain types of documents.
9.2.1 What is the sequential workflow?
A sequential workflow allows you to request reviews from a series of people, one at a time. The first person receives a request for comments, editing, and approval. If the first reviewer rejects the content, the workflow stops until you make the changes necessary to get approval. If the first reviewer approves the content, the next person in the series is notified to review the content. The reviews continue until everyone in the series has approved the content.

As an example, a party leader could set up a workflow in which a file is approved or rejected by the head of a technical committee and then approved or rejected by a senior regional soil scientist. Approvals, rejections, and document versions are all tracked, and members of the workflow can be automatically notified of changes by email.

9.2.2 What is the parallel workflow?
A parallel workflow allows you to request reviews simultaneously from two or more people. Each reviewer is asked for comments, edits, and approval. You are notified of their responses, which are recorded.

For example, a regional director could set up a workflow in which all of the party leaders in the region are requested to comment on a business plan. The workflow would notify the party leaders and track their responses.
9.2.3 What is the Soils Document Workflow?
The Soils Document Workflow is a pre-customized sequential workflow. It includes 5 reviews.

<table>
<thead>
<tr>
<th>Review</th>
<th>Example reviewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical review</td>
<td>Soil data quality specialist or senior regional soil scientist</td>
</tr>
<tr>
<td>Preliminary approval</td>
<td>Soil data quality specialist or senior regional soil scientist</td>
</tr>
<tr>
<td>Broad technical review</td>
<td>Head of tech team</td>
</tr>
<tr>
<td>Preliminary approval</td>
<td>State soil scientist</td>
</tr>
<tr>
<td>Final approval</td>
<td>Regional director</td>
</tr>
</tbody>
</table>

![Soils Document Workflow Diagram]
9.2.4 What is the Publication Workflow?
The Publication Workflow is a pre-customized sequential workflow. It includes 4 reviews.

<table>
<thead>
<tr>
<th>Review</th>
<th>Example reviewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical review</td>
<td>Soil data quality specialist, senior regional soil scientist, or national technical specialist</td>
</tr>
<tr>
<td>Editorial approval</td>
<td>Editor at regional office or NSSC</td>
</tr>
<tr>
<td>Publication approval</td>
<td>Regional director or national leader</td>
</tr>
<tr>
<td>Policy check</td>
<td>Webmaster</td>
</tr>
</tbody>
</table>

![Publication Workflow Diagram](image_url_for_diagram)
9.3 **How do I launch a workflow?**

Generic workflows can be launched on any type of document.

Pre-customized workflows can be launched only on specific document classes. See [What are document classes?](#)

- The Soils Document Workflow may be launched on:
  - Soils Documents
  - Publication Documents
  - Soils Description Documents
  - Training Documents
- The Publication Document workflow may only be launched on a Publication Document.

### 9.3.1 National Document Management (NDM) Sequential Workflow

**9.3.1.1 Steps for person launching the workflow**

Step 1: Navigate to a document for which you are the owner or author.
Step 2: Right-click the document and click **Launch Workflow**.
Step 3: Select **NDM Sequential Soils Document Approval** and click **OK**.
Step 4: Under the **Properties** tab:
- Select the **Reviewers** in the sequence the document needs to be reviewed. The sequence can be re-arranged after the users have been selected.
- Enter a **Workflow name** of your choice.
- Enter **Instructions for the reviewer**.
- Enter a **Due date**.
- Click **Launch Workflow**.

Upon launch, a notification will go to the first reviewer. Once first reviewer approves, a notification will go to the second reviewer.

Step 5: Click the **Work View** icon on the left menu bar.
Step 6: Click **Soils Tracker** and double-click the workflow to open the history and milestones.
9.3.1.2 Steps for person reviewing the document

Step 1: Click the Work View icon on the left menu bar.
Step 2: Click Soils Application > Personal Work > Soils Inbox.
Step 3: Select the Workflow item that needs to be reviewed and click Open.

Step 4: Click the Attachments tab.
Step 5: Right-click the document and select an option. Preview will open the document in a viewer. Download will save the document to your computer. Check Out and Download will save the document to your computer and lock the file until you check it back in.
Step 6: Make any required changes to the document. Check in the new version by right-clicking the document in the workflow, selecting Check In, and uploading the document.

Note: During the review and edit of a document, you may click Save in the workflow window and then reopen the workflow item at a later time.
Step 7: If the workflow item was previously closed, click the **Work View** icon to reopen the item.
Step 8: Under the **Properties** tab, add **Comments**, and click **Approve** or **Reject**.

9.3.2 National Document Management (NDM) Parallel Workflow

9.3.2.1 Steps for person launching the workflow
Step 1: Navigate to a document for which you are the owner or author.
Step 2: Right-click the document and click **Launch Workflow**.
Step 3: Select **NDM Parallel Soils Document Approval** and click **OK**.

![Launch Workflow](image)

Step 4: Under the **Properties** tab:
- Select the **Reviewers** for the document. Because this is a parallel review, all reviewers will receive the document at the same time.
- In the **Approvals required** section, select the number of reviewers who need to approve the document. If you select **All** reviewers, the workflow will only be complete when all the reviewers approve it.
- Enter a **Workflow name**.
- Enter **Instructions for reviewers**.
- Enter a **Due date**.
- Click **Launch Workflow**.
Step 5: Click the **Work View** icon.
Step 6: Click **Soils Tracker** and double-click the workflow item to open the history and milestones.

Notification will go to all reviewers at the same time.

You can choose if all reviewers need to approve the document for the workflow to be complete.

Notification will go to all reviewers at the same time.
Step 7: Ensure the workflow includes all specified reviewers.

9.3.2.2 Steps for person reviewing the document
Step 1: Click the Work View icon on the left menu bar.
Step 2: Click Soils Inbox.
Step 3: Select the workflow item that needs to be reviewed and click Open.
Step 4: Click the **Attachments** tab.

Step 5: Right-click the document and select an option. **Preview** will open the document in a viewer. **Download** will save the document to your computer. **Check Out and Download** will save the document to your computer and lock the file until you check it back in.

Step 6: Make any required changes to the document. Check in the new version by right-clicking the document in the workflow, selecting **Check In**, and uploading the document.

Note: During the review and edit of a document, you may click **Save** in the workflow window and then reopen the workflow item at a later time.

Step 7: If the workflow item was previously closed, click the **Work View** icon to reopen the item.

Step 8: Under the **Properties** tab, add **Comments** and click **Approve** or **Reject**.
9.3.3 Soils Document Workflow

9.3.3.1 Steps for person launching the workflow
Step 1: Navigate to a document for which you are the owner or author.
Step 2: Right-click the document and click **Launch Workflow**.

Step 3: Select **SOILS - Document Workflow** and click **OK**.
Step 4: Under the **Properties** tab:

- **Enter Instructions** for all reviewers.
- **Enter Due Date** for each step.
- Select the reviewers for each step.
- Enter any **Comments**.
- Click **Launch Workflow**.

Launcher can enter instructions for all reviewers here.

Enter due dates for each step in the workflow.

Select reviewers for each step in the workflow process.
Step 5: Click the **Work View** icon on the left menu bar.  
Step 6: Click **Soils Tracker** and double-click the workflow item to open the history and milestones.

![Step 5 and 6](image)

### 9.3.3.2 Steps for person reviewing the document

Step 1: Click the **Work View** icon on the left menu bar.  
Step 2: Click **Soils Inbox**.  
Step 3: Select the workflow item that needs to be reviewed and click **Open**.

![Steps for person reviewing the document](image)
Step 4: Read the instructions at the top.
Step 5: Click the **Attachments** tab.
Step 6: Right-click the document and select **Preview**.
Step 7: Under the **Properties** tab, add a **Comment** and click **Approve** or **Reject**.

Click on the attachments tab to preview the document for review.
9.3.4 Publication Document Workflow

9.3.4.1 Steps for person launching the workflow
Step 1: Navigate to a document for which you are the owner or author.
Step 2: Right-click the document and click Launch Workflow.

Step 3: Select Publication Document Workflow and click OK.
Step 4: Under the **Properties** tab:
- **Enter Instructions** for all reviewers.
- **Enter Due Date** for each step.
- Select the reviewers for each step.
- **Enter any Comments**.
- Click **Launch Workflow**.

Launcher can enter instructions for all reviewers.

Enter due dates for each step in the workflow.

Select reviewers for each step in the workflow process.
Step 5: Click the **Work View** icon on the left menu bar.
Step 6: Click **Soils Tracker** and double-click the workflow to open the history and milestones.

9.3.4.2 **Steps for person reviewing the document**
Step 1: Click the **Work View** icon on the left menu bar.
Step 2: Click **Soils Inbox**.
Step 3: Select the workflow item that needs to be reviewed and click **Open**.
Step 4: Read the instructions at the top.
Step 5: Click the **Attachments** tab.
Step 6: Right-click the document and select **Preview**.
Step 7: Under the **Properties** tab, add **Comments** and click **Approve** or **Reject**.

9.4 **HOW DO I AUTHORIZE A FILE TO BE PUBLISHED TO THE WEB?**

The Publication Document Workflow constitutes a formal request for publication. See [What are workflows?](#) and [Publication document workflow](#). In this context, “publication” means “making the file visible to the public.”

Files can be authorized for publication by changing the Distribution Approval Code (DAC). Members of the following groups can change the DAC.

- NRCS-NSSC-SS-Regional-Directors
- NRCS-NSSC-SSD-Leadership-Team
- NRCS-NSSC-Leadership-Team
- NRCS-NSSC-SSD-ECM-Admin
The DAC is a metadata element that is available for the following document classes: Publication, Publication with Location, and Soil Description with Location. The options for DAC are:

- Not distributed (Default)
- Internal only
- National Website
- Regional Website
- Web Soil Survey
- Photo Gallery Publication
- Press Publication
- Any outlet

National leaders and regional directors have the ability to update the DAC.
9.5 **HOW DO I AUTHORIZE CONTENT FOR DELIVERY TO THE WEB SOIL SURVEY?**

Although it is not yet possible to deliver content to the WSS from the document manager, the process for authorizing content is in place. The process is the same as that for authorizing publication on the Web, except the Distribution Authorization Code needs to specify “Web Soil Survey.” (See [How do I authorize a file to be published to the Web?](#))
9.6 How do I know if a file or project has been approved?

The workflow status of a document is retained as a system property. When the workflow for a document is completed, the workflow status changes from “In Progress” to “Complete.”

The Distribution Approval Code indicates if-and-how a document may be published.

---

4 Project: Any activity that can be captured as a set of files. Not to be confused with a NASIS project.
10 **BEST PRACTICES**

- Press the **F11** key at the start of your session and again at the end.
- If you want to change a file, use **Check Out and Download > Save As**.
- Remember that the system does not have a recycling bin. If you delete a file, it is gone.
- When you assign permissions, use the smallest group possible. For example, don’t use SSR5-All if SSR5-Office will work.
- Do not use SSD-All unless you are a regional director or national leader.
- Do not remove yourself from the Owners role.
- Do not use the Denied Access role for groups.
- Add as much metadata as possible. The more you add, the easier the file is to find.
- Use minor versions for drafts and major versions for finished documents.
11 CONTACTS

Contact the Soils Hotline (SoilsHotline@lin.usda.gov or 402-437-5379) for general assistance and for help setting up new Active Directory (permission) groups.

11.1 USER’S GUIDE
This user’s guide was developed by Rekha Bhanuchandran, TSPi, and Aaron Achen, NRCS.

<table>
<thead>
<tr>
<th>Rekha Bhanuchandran</th>
<th>Aaron Achen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sr. Business Analyst, TSPi</td>
<td>Editor, National Soil</td>
</tr>
<tr>
<td>(703) 434-3632</td>
<td>Survey Center</td>
</tr>
<tr>
<td><a href="mailto:rekha.bhanuchandran@tspi.net">rekha.bhanuchandran@tspi.net</a></td>
<td>(402) 437-4157</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:aaron.achen@lin.usda.gov">aaron.achen@lin.usda.gov</a></td>
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<table>
<thead>
<tr>
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<th>Issue Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>7/14/17</td>
<td>User acceptance testing</td>
</tr>
<tr>
<td>2.0</td>
<td>11/30/17</td>
<td>Final preproduction version</td>
</tr>
<tr>
<td>2.1</td>
<td>2/12/18</td>
<td>Initial production version</td>
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<tr>
<td>2.1.1</td>
<td>3/5/18</td>
<td>Clarified section 7.1.3.</td>
</tr>
</tbody>
</table>
Appendixes

12 Appendix 1.—Batch Uploading Using ICC

The unit administrator for each business unit has authorization to use the IBM Content Collector (ICC). The ICC allows large numbers of files to be uploaded to the document manager.

The steps used by the unit administrator:

1. Collect the files into a single folder.
2. Ensure that an appropriate target folder is available in the document manager.
3. Add the metadata for the files to the appropriate ICC spreadsheet.
4. Upload the files and spreadsheet to CloudVault.

Step 1.—All files must be in a single folder. They cannot be separated into subfolders at this time.

Step 2.—The files will inherit the permissions of the folder they are uploaded into. Ensure that this target folder has the permissions that you want added to the files.

Step 3.—The four types of metadata spreadsheets are customized for publication documents, training documents, soils description documents, and soils (generic) documents. Each spreadsheet contains columns for the metadata elements of one of the document classes. A set of spreadsheets is available to the administrator for each region and other business unit.

- The file names and paths in the spreadsheets are case sensitive.
- For any column that uses a dropdown menu, you must use exactly the dropdown entries. Any error in a line in the spreadsheet will cause that file to fail to load.
- Dates follow the m/d/yyyy format, not mm/dd/yyyy.
- A carriage return anywhere in the spreadsheet will stop the upload process. Search and replace carriage returns (alt-010) in Excel before creating the CSV file.
- The spreadsheet needs to be saved twice as a CSV (Comma delimited) file. Save the file as CSV. Close the file. Reopen and resave the file.
- The name of the spreadsheet needs to include .<document template>.csv at the end; e.g., spreadsheetname.soilsdesc.csv.
- Files stay in CloudVault after the batch upload is complete until someone manually removes them. They won’t interfere with the next batch as long as the file names are different, unless you wanted to ingest those files and you referenced them.
Following is a partial view of the training documents spreadsheet:

![Excel spreadsheet image]

Fill out a row for each document that is being uploaded into the ECM. If you are missing a required field, the file will not upload. If you exceed the character limit for a row, the file will not upload.

Step 4.—CloudVault is used as a file share. (Specific information is available to authorized individuals from the Soils Hotline.) Upload the files and spreadsheet into a CloudVault folder. The files will automatically upload into the ICC and then the document manager.
13 **APPENDIX 2.—CREATING AD GROUPS FOR TSS**

13.1 **NOTIFICATION**

The NSSC is developing business requirements for the document management part of an Enterprise Content Management (ECM) system. The ECM will allow us to manage the development and publication of soils information. Each employee’s ability to read and create documents in the ECM will be based on Active Directory (AD) groups. The AD is the secure system of permissions that also controls your ability to login to Windows and SharePoint.

We need to create new groups in the AD to enable certain employees who are not in the Soil Science Division, such as resource soil scientists, access to the Enterprise Management System.

We need each State Soil Scientist to:

- Submit a Remedy request to create a group populated with the resource soil scientists in their State. Any NRCS soil scientist in the State who is NOT an MLRA soil scientist should be added to the group. The groups must be named NRCS-xx-TSS, where xx is the State code. These new groups will be used in ECM to grant permissions to TSS folders. These same groups can also be used to grant permissions in SharePoint. Please note that if someone outside of your State is providing TSS support, they should also be added to this group.
- Submit a Remedy request to create a group populated with individuals to do higher level work within ECM at the State level. Examples of higher level work include controlling permissions for ECM folders and approving documents for distribution. The group must be named NRCS-xx-ECM-ADMIN, where x is the State code. The groups should include the State Soil Scientist and one or more designees.

Attached are forms for both types of groups for each State. Each State will have a form for NRCS-xx-TSS and a form for NRCS-xx-ECM-ADMIN.

The NRCS-xx-TSS form needs boxes 5 thru 10 populated and item #18 completed with names of soil scientists. The NRCS-xx-ECM-ADMIN form needs boxes 5 thru 10 populated and item #18 modified to add one or more “designees” if the SSS so wishes. A designee will be given permission to work on the behalf of the SSS to manage folders in ECM.

Also attached are instructions on submitting the Remedy request, which may be done by the SSS or the support person that normally submits these types of requests.

Once these groups are created, it is the responsibility of the State to maintain their memberships. As people are hired/leave and an IRM3/SAAR ticket is processed, the new hire should be added to/removed from the appropriate groups.

Anyone with questions may contact Tammy Cheever directly at 402-437-5379 or tammy.cheever@lin.usda.gov.
13.2 **INSTRUCTIONS FOR REMEDY REQUEST TO CREATE NEW ACTIVE DIRECTORY GROUPS**

Each of you may have a different looking main page once you login to Remedy. Once you login to Remedy, click on the Home icon and then choose SRM Home Page.

On the BMC Service Request Management screen, click on the Browse button, as shown in screenshot below.

![BMC Service Request Management](image)

Pull the blue slider arrow down under “Available Requests” until you find “Distribution List Request – V1.0” Click on it and then click “Request Now”.

![Available Requests](image)
Be sure to click the green plus icon and attach the completed form for the group you are requesting be created.

Next put in the Business Owner and TSD Contact information. The TSD Contact will be the TSD group name from Box 17 on the form. The Business Owner can be the State Soil Scientist. Basically it is someone that CTS can contact if they have questions about this group.

The Distribution List Agency is: USDA-NRCS

The Distribution List Region and the Distribution List City is the state where the SSS is located.

Descriptive Name for the account is Box 11 from the form.

User ID’s for all users who will be members of this group. Use the members listed in Item #18 or follow the instructions in Item #18.

Justification for the request: Use information from box 11 on the form.
14 Nondiscrimination Statement

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Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible Agency or USDA’s TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at How to File a Program Discrimination Complaint and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

1. mail: U.S. Department of Agriculture
   Office of the Assistant Secretary for Civil Rights
   1400 Independence Avenue, SW
   Washington, D.C. 20250-9410;
2. fax: (202) 690-7442; or
3. email: program.intake@usda.gov.

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