

# EDM User Guide – Using Executive

Version 3

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[ithelp.port.ac.uk/ittraining](http://ithelp.port.ac.uk/ittraining)

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## 1. Introduction

Executive enables access to the EDM system via a web browser. The primary function is to enable staff to access University records stored in EDM from Apple Mac, iOS, Android and any other device which does not support the core product (Objective Navigator).

It can also be used by Navigator users when they are working away from their normal machine, i.e. when working out of the office or at home.

This guide will provide information on how to navigate within Executive and to use some of the principal features.

## 2. Preparing to use Executive

Executive can be used with any mainstream web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Internet Explorer, Safari, Opera) on any operating system (e.g. Windows, Mac OSX, Linux, iOS, Android).

Executive uses a Java applet to provide some enhanced functionality and so users are recommended to install Java if prompted to do so.

Executive also makes use of pop-up windows, so ensure that pop-ups are enabled for the University web domain (port.ac.uk) in the chosen web browser.

### 3. Logging in to EDM using Executive

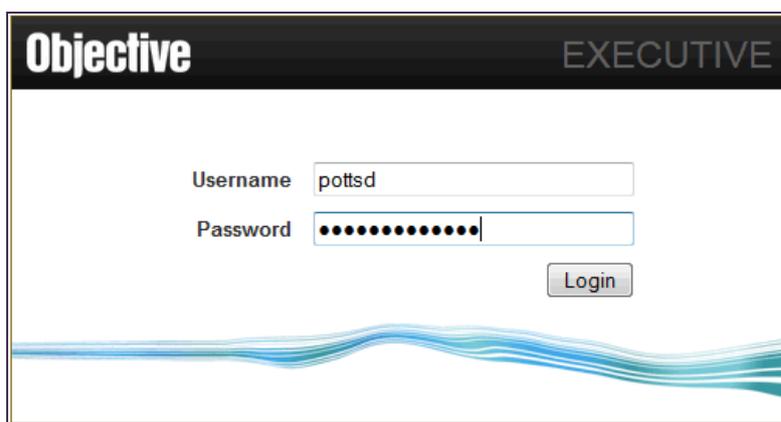
To log in to EDM and browse the folder structure, use the following URL:

[http:// executive.port.ac.uk](http://executive.port.ac.uk)

It is recommended that this link is bookmarked, for ease of future access to EDM.

The initial login screen will be displayed, see Figure 1 below. Users should login with their University network userid and password.

Figure 1



If a pop-up warning message is shown stating that Java is 'disabled, not installed or out of date' users can choose to install or update Java or select 'Cancel' to proceed without Java.

To prevent the message being displayed in the future, select the checkbox.

On University computers running the Windows operating system, Java should be installed from 'MyApps'.

### 4. The Executive interface

When logged into EDM via Executive, the starting position will be within the Home folder.

If aliases to documents have been created in the user's Handy Folder while using Objective Navigator they will be listed in the 'Favourite Documents' link, see Figure 3.

To add to the 'Favourite Documents' list, select (★) against the appropriate document/s.

Aliases to files or folders are displayed in the 'Folder' section.

Aliases to saved search/es are displayed in the 'Search for' section.

The main display panel can be customised to show items in 'List' or 'Grid' views using the drop-down selector at the top right of the screen. The 'View' selector can be used to choose the number of items displayed on a single screen, see Figure 2.

Figure 2



If there are additional item to view which aren't displayed, page navigation buttons will appear at the bottom of the screen.

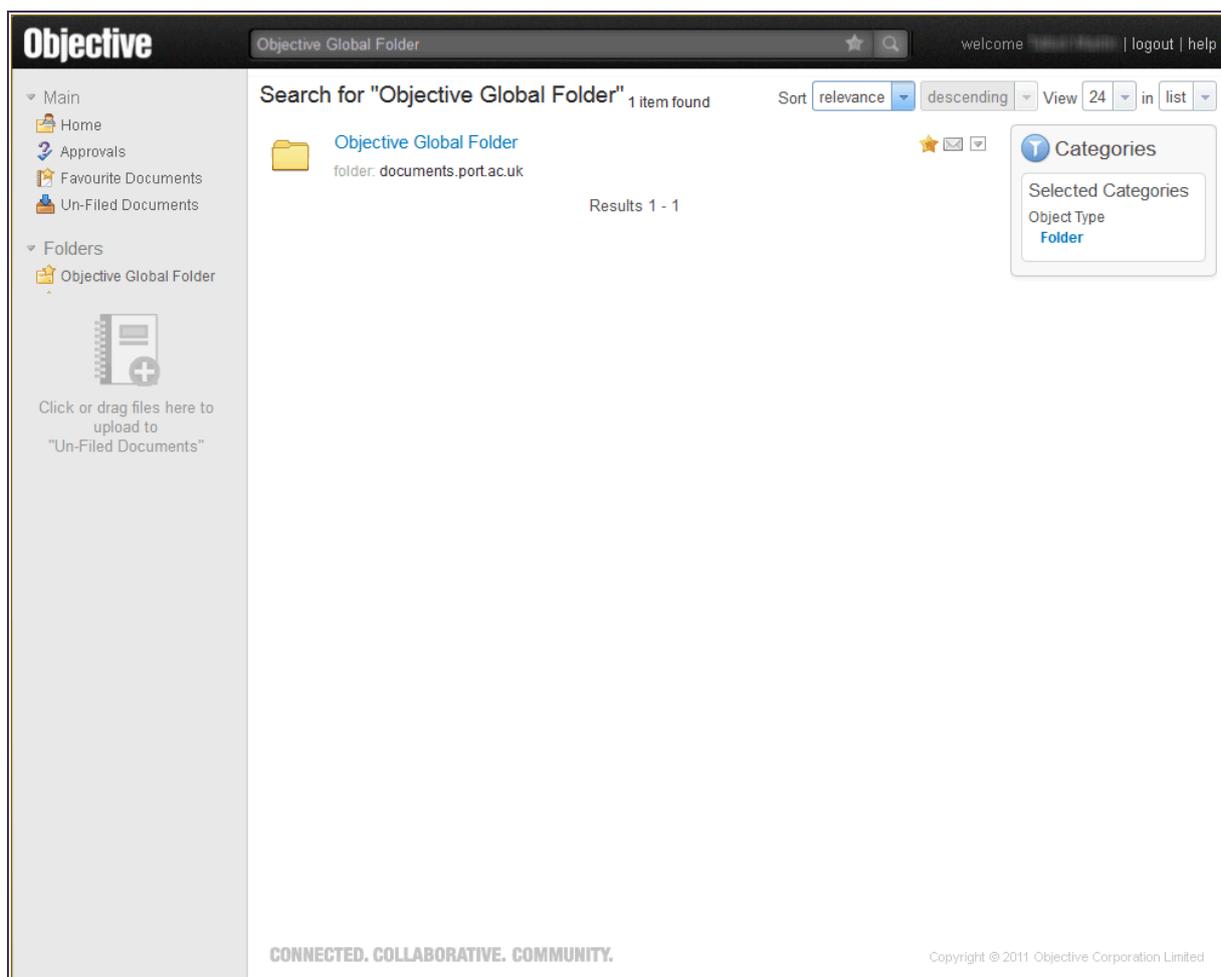
## 5. The Folder Structure

When logged into EDM via Executive, the starting position will be within the Home folder.

In order to be able to access the university folder structure, use the search function to locate the 'Objective Global Folder'.

Add 'Objective Global Folder' to the favourite folders list by selecting the favourite icon (★) against the search results list.

Figure 3



To display the contents of a folder or file, select the name. This can be undertaken via the:

- main display panel
- navigation area on the left hand side
- breadcrumb bar above the main display area

In the List view each item is displayed with a link to its parent file or folder, see Figure 4. When navigating through the folder structure the parent folder structure is also displayed in the breadcrumb bar.

Figure 4

The screenshot displays the Objective web application interface. At the top, there is a navigation bar with the 'Objective' logo, a search bar, and user information including 'welcome [username] | logout | help'. Below the navigation bar, the main content area is divided into a left sidebar and a central workspace. The sidebar contains a 'Main' section with links for Home, Approvals, Favourite Documents, and Un-Filed Documents. Below this is a 'Folders' section listing various folders like '1031 Electronic Docum...', '13 Training', 'Phase 2 Courses', 'UoP Training Kit', and 'Objective Global Folder'. At the bottom of the sidebar is an upload area with a printer icon and the text 'Click or drag files here to upload to "Un-Filed Documents"'. The central workspace shows a breadcrumb trail: 'Objective Global Folder > Professional Service - Information Services'. Below this, there is a list of 10 folders, each with a yellow folder icon, a blue title, and a subtitle 'folder: Professional Service - Information Services'. The folders are: Asset Management, Audit, Committees, Communications, Finance, Human Resources, IS Projects, Risk Management (inc. Health & Safety), Strategy & Governance, and Training. To the right of each folder title are three icons: a speech bubble, a star, and a checkmark. At the top right of the workspace, there are sorting options: 'Sort name ascending' and 'View 24 in list'. A 'Categories' panel is visible on the right side of the workspace, showing a search icon and the text 'Type document folder internet link search'. At the bottom of the workspace, it says 'Results 1 - 10 of 10'. The footer of the page contains the text 'CONNECTED. COLLABORATIVE. COMMUNITY.' and 'Copyright © 2011 Objective Corporation Limited'.

## 6. Object Feature Icons

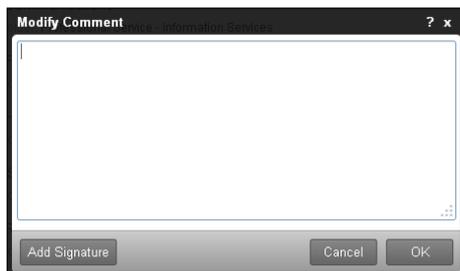
There are a number of icons located to the right of each folder, file or document when listed on the screen.



### The Comment Icon

When selected, a window is displayed, see Figure 5.

Figure 5

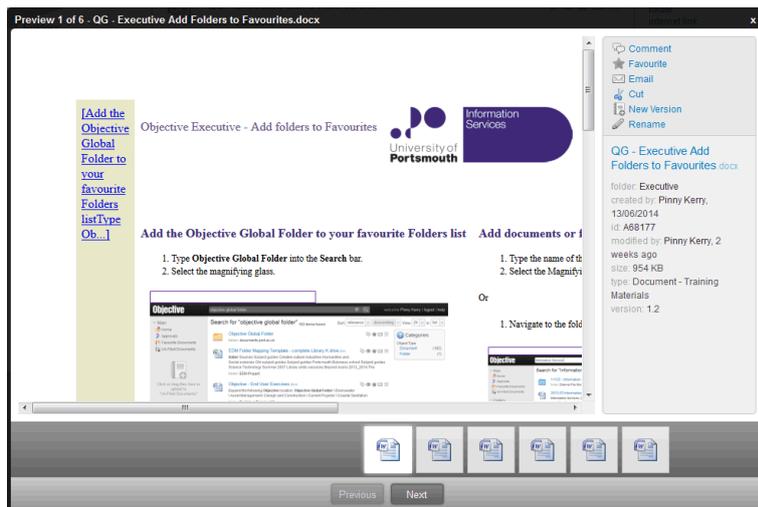


This function is not used.

### The Preview Icon

When selected, a screen is displayed, see Figure 6. Only available for documents.

Figure 6



This window provides a preview of the document with an expanded set of feature icons, see Figure 10. Icons and buttons allow the user to preview other documents in the same file or folder.

## The Favourite Icon

When selected against folders, it will be added to the favourite list appearing gold (  ).

If the folder is not listed in the favourite folders area, select the '**see all**' link.

**Note:** Adding an object to the favourite list in Executive, will automatically create an alias in the **Handy** folder in Objective Navigator.

The current list of favourite files and folders is available under the Folders heading, see Figure 7.

**Figure 7**



This list shows the current 'Top 5'. To see a full list of the nominated favourite folders, select the **see all** link.

**Note:** The 'see all' link only appears when hovered over an existing top 5 folder entry.

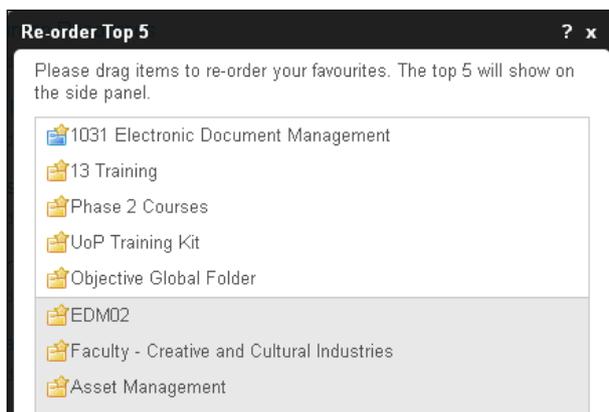
To customise the **top 5**, select the **re-order** link which appears when hovered over an existing entry, see Figure 8.

**Figure 8**



The following screen then appears, see Figure 9.

**Figure 9**



To change the composition of the top 5, **drag a folder** from the shaded section into the top 5 section. Once customisation has been applied, select the close button .

The favourite icon (  ) can also be used for documents and searches.

Favourite documents are displayed by selecting the 'Favourite Documents' link.

Favourite searches are displayed in the 'Search for' section.

All objects marked as favourites, will also have an alias created, available in the Handy folder within Objective Navigator.

## The email icon

To send a link to an EDM object to another EDM User:

- Locate the desired object in Executive.
- Select the email icon . This will generate a draft message within Google mail.
- Complete the 'To' field with the email address/es of the person/s that the reference is being sent to.
- Place a personal message in the email body if appropriate.
- Select 'Send'.

The e-mail function will use the standard 'mailto' function defined for the browser. On standard University Windows systems this should use the Affixa program to generate an e-mail from the University Google mail account.

## The Expand Icon

When selected alongside an object, an expanded view is shown with additional information about the object and some additional function icons, see Figure 10.

Figure 10



A snapshot of some basic metadata about the object, and a panel of links including the **comment**, **favourite**, and **email** links, as previously discussed in this document.

For folders and files there are additional links to **upload**, **rename** and **collapse**.

- **Upload** – enables upload of a document in to a specific folder or file
- **Rename** – allows amendment of the name of the object (providing appropriate account permissions have been assigned to the user)
- **Collapse** – closes the expanded view

For documents there are additional links for **cut**, **new version**, **rename** and **collapse**.

- **Cut** – allows objects to be moved (an extended view appears which includes the 'Paste' function). It cannot be used to delete an object.
- **New Version**– used to import an updated version of a document into EDM. The new version is loaded from disk.
- **Rename** – allows amendment of the name of the document (providing appropriate account permissions have been assigned to the user)
- **Collapse** – closes the expanded view

## 7. Managing Documents

### Opening a document to view

To open a document, double-click on the name of the document in the main display panel, or in the preview screen.

The document will be downloaded locally to the machine and opened with whichever application is setup to handle the file type on the system.

**Note:** Ensure that the appropriate application to handle the documents has been installed on the machine being used, e.g. Microsoft Office for Word documents, Adobe Reader for PDF documents etc.

**Note:** Documents will be downloaded locally to the machine. Understanding where downloaded documents will be stored on the system. It is the users responsibility to ensure that downloaded documents are completely removed from the system once they have been finished working with them. Documents should be deleted from the system, and the 'Recycle Bin' / 'Trash' emptied at the end.

### Updating a document

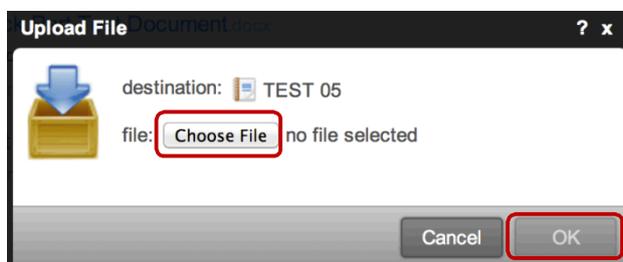
Open the document as described above and make any required changes. Save the document locally on the system and select 'New version' from the document functions, see Figure 11.

Figure 11



Select 'Choose file' and then select the updated version of the document from your system:

Figure 12



Select 'OK' to upload the new version of the document.