

## The View Documents Module

The View Documents module allows you to see all documents related to a Project, from all of the various sources and Business Modules.

### To Access the View Documents Module

1. Select a Project by typing the Item and Item Segment number in the **Go To Project** field or use the **My Projects** tab to select a previously visited or bookmarked Project.
2. Select the **Documents** module from the Module Menu. The Documents Module will be displayed. It will instantly display all documents related to the selected Project.

The screenshot shows the 'View Documents' module interface. At the top, there is a 'Go To Project' field with a search icon and a 'Project - Search - My Assi' breadcrumb. The left sidebar contains a 'Module Menu' with two sections: 'Manage' and 'View'. Under 'Manage', there are checkboxes for Address Book, Commitments, Design Approval Requests, Environment, External Agency, Permits, Project Status, and Survey Work Order. Under 'View', there are checkboxes for Contracts, Documents (highlighted with a red box), and ERC. The main content area displays 'Project Info [413432-1] (Click to expand)', followed by a 'Documents (Click to collapse)' section containing a link for 'Add/Remove Parameters'. Below this are two sections: 'All PSEE Documents (Click to collapse)' showing 'No Documents Found', and 'All Enterprise Documents (Click to collapse)' with filters for 'Location: CO : 13' and 'Business Area: ALL : 13'.

The Documents module is separated into two sections:

- **All PSEE Documents**
- **All Enterprise Documents**

The screenshot displays the PSEE Documents module interface. At the top, there is a blue header bar with the text "Documents (Click to collapse)" and a help icon. Below the header, there is a link "Add/Remove Parameters".

The first section is "All PSEE Documents (Click to collapse)". It features filter dropdowns for "Group: PROJECT : 1" and "Type: PHASE 2 PLAN REVIEW : 1". Below the filters is a table with columns: "EDMS Doc No", "Document Name", "Description", "Project", and "Contract". A single document is listed with EDMS Doc No 914686, Document Name "ABC Meeting Notes.pdf", Description "Information from meeting.", Project "413432-1", and a "View" link. Below the table, it says "Page 1 (Showing Items 1 to 1 of 1) Show per page 20 50 100".

The second section is "All Enterprise Documents (Click to collapse)". It features filter dropdowns for "Location: CO : 13", "Business Area: ALL : 13", "Group: NA", and "Type: NA". Below the filters is a table with columns: "EDMS Doc No", "Document Name", "Description", "Business Area", "Group", "Type", and "Contract". Two documents are listed:

| EDMS Doc No | Document Name                                   | Description | Business Area    | Group                                      | Type             | Contract |                      |
|-------------|---|-------------|------------------|--|------------------|----------|----------------------|
| 373734      | DOCUMENT CONTROL CONSTRUCTION CONTRACT DOCUMENT | BOX 177     | DOCUMENT CONTROL | CONSTRUCTION CONTRACTS                     | CONTRACT         | T3223    | <a href="#">View</a> |
| 373865      | 5/18/2009                                       | BOX 388     | DOCUMENT CONTROL | SUPPORTING CONSTRUCTION CONTRACT DOCUMENTS | EXECUTION LETTER | T3223    | <a href="#">View</a> |

## All PSEE Documents

The All PSEE Documents section allows staff to view the documents about a specific project that have been added through PSEE. This is where all working documents should be stored. These documents are viewable through PSEE or the Department's Enterprise Electronic Document Management System. However, documents stored in this location can be edited, deleted by the Project Manager or the person that stored the document.

### To View PSEE Project Documents

1. Click the **View** hyperlink in the far right column beside each document name and details.
2. The document will open in a new window using its native application.
3. Close the window when done viewing the document.

### To Filter the List of All Enterprise Documents

The All PSEE Documents list can be very large for some Projects. Use the filter selections at the top to refine the document list. You may filter on Group and Type.

1. Select the drop-down beside the criteria you would like to filter.

**Documents** (Click to collapse)

[Add/Remove Parameters](#)

**All PSEE Documents** (Click to collapse)

Group: PROJECT : 1

Type: PHASE 2 PLAN REVIEW : 1

| <a href="#">EDMS Doc No</a> ^ | <a href="#">Document Name</a> | <a href="#">Description</a> | <a href="#">Project</a> | <a href="#">Cont</a> |
|-------------------------------|-------------------------------|-----------------------------|-------------------------|----------------------|
| 914686                        | ABC Meeting Notes.pdf         | Information from meeting.   | 413432-1                |                      |

Page 1 (Showing Items 1 to 1 of 1) Show per page 20 50 100

**All Enterprise Documents** (Click to collapse)

Location: CO : 13

Business Area: ALL : 13

Group: ALL : 13  
CONSTRUCTION : 3  
DOCUMENT CONTROL : 10

Type: DOCUMENT CONTROL : 10

| <a href="#">EDMS Doc No</a> ^ | <a href="#">Document Name</a>                   | <a href="#">Description</a> | <a href="#">Business Area</a> | <a href="#">Group</a>  | <a href="#">Type</a> |
|-------------------------------|---|-----------------------------|-------------------------------|------------------------|----------------------|
| 373734                        | DOCUMENT CONTROL CONSTRUCTION CONTRACT DOCUMENT | BOX 177                     | DOCUMENT CONTROL              | CONSTRUCTION CONTRACTS | CONTRACT             |

- Each drop-down selection will include a number. This is the number of documents that meet that particular selection. If there are no additional values in the drop-down list, then you cannot filter on that field.
- Once you choose an item from the list, your document list will immediately be filtered.

### To Sort the List of PSEE Documents

The PSEE document list may be sorted by the column headings.

- By default, the list is in ascending order by EDMS Number.
- Click on any hyperlinked column heading to resort the column in ascending order. An upward pointing arrow will appear beside the sorted column. Click the column header again to resort in descending order.

| <a href="#">EDMS Number</a> | <a href="#">Document Name</a>                   | <a href="#">Description</a> | <a href="#">Group</a> ^ | <a href="#">Type</a>     | <a href="#">Contract</a> | <a href="#">View</a> |
|-----------------------------|---|-----------------------------|-------------------------|--------------------------|--------------------------|----------------------|
| 734879                      | 5/18/2010                                       | BOX 212                     | CONSTRUCTION CONTRACTS  | CERTIFICATE OF INSURANCE | T3223                    | <a href="#">View</a> |
| 380607                      | DOCUMENT CONTROL CONSTRUCTION CONTRACT DOCUMENT | BOX 402                     | CONSTRUCTION CONTRACTS  | CERTIFICATE OF INSURANCE | T3223                    | <a href="#">View</a> |

*This list is in ascending order by Group*

### Enterprise Project Documents

The Enterprise Project Documents section includes documents that have been uploaded to the Department’s Enterprise Electronic Document Management System (EEDMS) by a system other

than PSEE. Documents available in section have been stored using the Project Number of the Project you are viewing. *This is also referred to as being "attributed" using the Project Number.*

### **To View All Enterprise Documents**

1. Click the **View** hyperlink in the far right column beside each document name and details.
2. The document will open in a new window using its native application.
3. Close the window when done viewing the document.

### **To Filter the List of Enterprise Project Documents**

The Enterprise Project Documents list can be very large for some Projects. Use the filter selections at the top to refine the document list. You may filter on Location, Business Area, Group and Type.

1. Select the drop-down beside the criteria you would like to filter.
2. Each drop-down selection will include a number. This is the number of documents that meet that particular selection. If there are no additional values in the drop-down list, then you cannot filter on that field.

### **To Sort the List of Enterprise Project Documents**

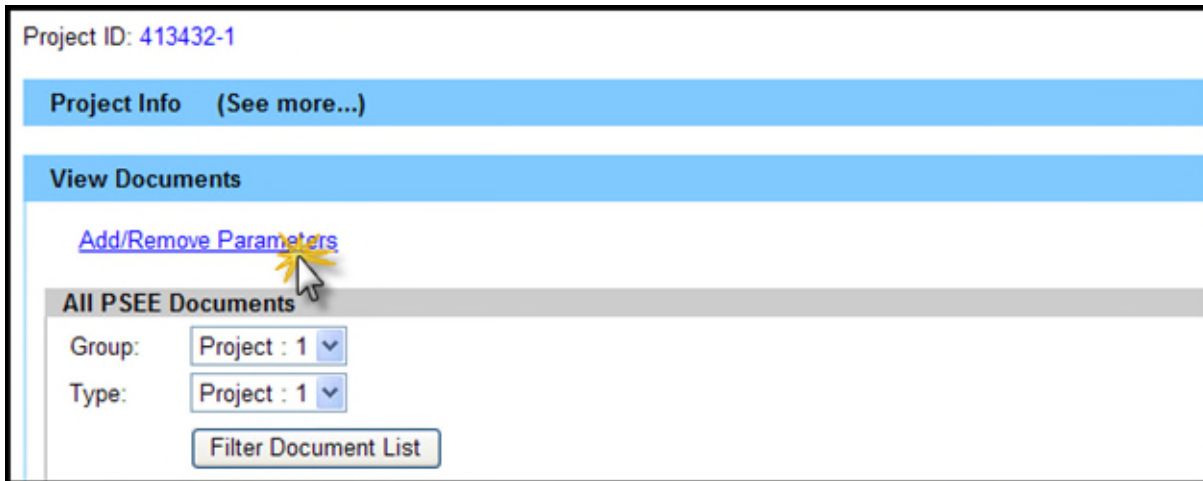
Once you have a list you may sort the list by the column headings.

1. By default, the list is in ascending order by EDMS Number.
2. Click on any hyperlinked column heading to resort the column in ascending order. You will now see an upward pointing arrow beside the sorted column. Click the column header again to resort in descending order.

### **Add/Remove Parameters Function**

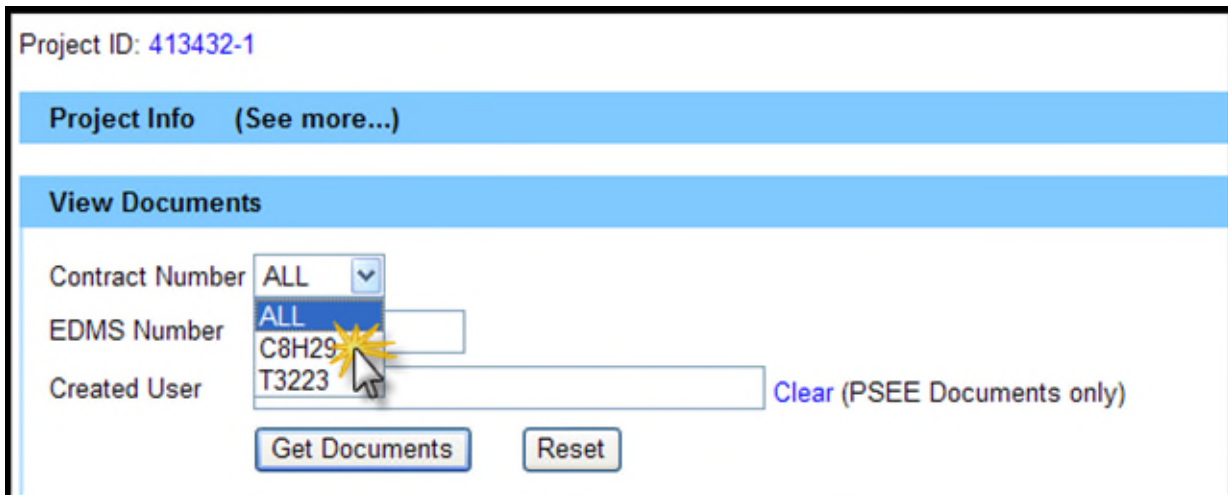
In addition to the tools described above for managing, sorting and filtering your documents, you may also limit the documents on both lists by searching the documents. You may search on Contract Number, EDMS Number or by the person that attached the document (PSEE Documents Only).

1. Click the **Add/Remove Parameters** link at the top of the View Documents module.



### Search by Contract Number

1. Click on the Contract Number drop down. All Contracts related to the current Project are listed. Select the Contract Number needed.



2. Select the **Get Documents** button. The list of results is returned. All of the documents displayed are related to the Contract Number you entered.

Project ID: 413432-1

**Project Info** (See more...)

**View Documents**

Contract Number: T3223 [Add/Remove Parameters](#)

**All PSEE Documents**  
No Data Found!

**All Enterprise Documents**

Location: CO : 10  
 Business Area: DOCUMENT CONTROL : 10  
 Group: ALL : 10  
 Type: NA

| <a href="#">EDMS Number</a> | <a href="#">Document Name</a>                   | <a href="#">Description</a> | <a href="#">Group</a>  | <a href="#">Type</a>     | <a href="#">Contract</a> | <a href="#">View</a> |
|-----------------------------|---|-----------------------------|------------------------|--------------------------|--------------------------|----------------------|
| 401416                      | DOCUMENT CONTROL CONSTRUCTION CONTRACT DOCUMENT | IMPORTED DOCUMENT           | CONSTRUCTION CONTRACTS | CONTRACT                 | T3223                    | <a href="#">View</a> |
| 740724                      | 5/18/2010                                       | BOX 121                     | CONSTRUCTION CONTRACTS | CERTIFICATE OF INSURANCE | T3223                    | <a href="#">View</a> |
| 373874                      | CONTRACT PERTINENT PAGES                        |                             | CONSTRUCTION CONTRACTS | PERTINENT PAGES          | T3223                    | <a href="#">View</a> |

3. Click **Add/Remove Parameters** at the top of the screen to alter your search parameters.

### Search By EDMS Number

Each document stored in EDMS is given a unique EDMS Document Number. You may search using this Document Number.

1. Type in an EDMS [Document] Number

**View Documents**

Contract Number: ALL

EDMS Number: 380607

Created User:  [Clear \(PSEE Documents only\)](#)

2. Select the **Get Documents** button. The list of results is returned. There will only be one document returned from this search.

**View Documents**

Document Number: 380607 [Add/Remove Parameters](#)

**All PSEE Documents**  
No Data Found!

**All Enterprise Documents**

Location: CO : 1 ▾  
Business Area: DOCUMENT CONTROL : 1 ▾  
Group: CONSTRUCTION CONTRACTS : 1 ▾  
Type: CERTIFICATE OF INSURANCE : 1 ▾  
[Filter Document List](#)

| <a href="#">EDMS Number</a> | <a href="#">Document Name</a>                   | <a href="#">Description</a> | <a href="#">Contract</a> | <a href="#">View</a> |
|-----------------------------|---|-----------------------------|--------------------------|----------------------|
| 380607                      | DOCUMENT CONTROL CONSTRUCTION CONTRACT DOCUMENT | BOX 402                     | T3223                    | <a href="#">View</a> |

3. Select **Add/Remove Parameters** at the top of the screen to enter a different EDMS Document Number.

### Search By Created User

Documents that were added using PSEE have a Created User field. This is the person that attached the document. You can search for documents added to PSEE by a certain user.



1. Begin typing the first or last name of the person. A list of matching names will begin to appear. Select the correct name.

Project ID: 413432-1

**Project Info** (See more...)

**View Documents**

Contract Number: ALL

EDMS Number:

Created User: barber

Clear (PSEE Documents only)

All PSEE Docur

Group: Pro

Type: Pro

- BARBER, DENNIS (KNAIMBD)
- BARBER, JACKIE (MPCWJB)
- BARBER, KEITH (KN106KB)
- BARBER, LONNIE (RD352BD)
- BARBER, WILLIAM (RD352BW)
- BARBERIC, JOHN (KNPBCBJ)
- LABARBERA, KAREN (CN216KL)

2. Select the **Get Documents** button. All documents submitted by the selected person in PSEE are displayed. The Project Number of the document is displayed. If the document is related to a Contract, that number is also displayed.

All PSEE Documents

Group: Project : 1

Type: Project : 1

Filter Document List

| EDMS Number | Document Name              | Description                   | Project  | Contract             |
|-------------|----------------------------|-------------------------------|----------|----------------------|
| 780461      | LocationOfContractDocs.pdf | Misc details on the contract. | 413432-1 | <a href="#">View</a> |

Page 1 (Showing Items 1 to 1 of 1)

3. Select **Add/Remove Search** at the top of the screen to enter a different Created User.