



# Controlled Document Portal User Manual

PDMS

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# 1 Terms of Reference

The Controlled Document Portal (CDP) is a software application and secure data repository provided by PDMS on a resilient, managed, Software-as-a-Service basis.

The CDP enables you to centrally store, edit and share documents with your various stakeholders, in a controlled way, no matter where they are in the world. Key features of this secure system include a simple folder-based filing structure, with document version controls, audit trails and search features, and sophisticated access/permission settings that your Administrator(s) can manage for each User of the system. Hosting, backups and upgrades are taken care of by PDMS as part of the monthly subscription package.

The CDP can be accessed via web-browsers using a secure connection from anywhere with Internet access. It is optimised for Internet Explorer (version 7 and above), and the latest versions of Firefox, Safari and Chrome.

Depending on how your network is set up, you may also be able to use Windows File Explorer to access CDP folders. If permitted by your organisation, you will be able to access folders and documents stored in the CDP via a network drive in the same manner that you access other network resources.

CDP Personal is an application which, once installed and configured, connects to the CDP server and downloads and stores the documents available to a user on their computer. Downloaded documents can then be viewed even when an Internet connection is not available.

This manual provides guidance for the use of the CDP and CDP Personal. For further resources and important information, please visit [www.pdms.com/cdp/resources](http://www.pdms.com/cdp/resources)

**Note:** Images have been included in this manual as a visual prompt to help locate the item in the application. As the CDP is enhanced, and as the interface to may have been tailored to suit your organisation, some controls may have a different appearance and location in your version of the application to those illustrated in this manual. Their behaviour, however, will be consistent with that described.

To facilitate identification of the control or icon being explained, red circles/ovals overlaying images of the system have been used as highlights, e.g. item of interest.

## 1.1 Change History

CDP Version	Summary of changes	Date
1.0	User Manual version 1	02/04/2012
1.3	Various, including CDP Personal	31/05/2012
1.5	Updated to include changes introduced on versions 1.4 and 1.5	02/10/2012
2.0	Updated to include changes introduced in CDP Version 2.0, i.e: forgotten password recovery; memorable word;	25/02/2012

## 2 Controlled Document Portal (CDP)

### 2.1 CDP Home Page and Documents

The Documents displayed on the CDP Home Page are those Documents within the CDP marked as “Visible without login”. These Documents are available to **all** Home Page visitors for viewing and downloading without need for authentication.

The Documents displayed can be filtered by Document Type by choosing the required Document Type from the displayed drop-down, and selecting the Go command button.

**PDMS**

Home About Login

**Access your document from anywhere in the World!**

The Controlled Document Portal (CDP) lets you access your documents from anywhere with an internet connection.  
Using the CDP you can provide your staff, partners or customers with the most up-to-date versions of key documents wherever they are in the world through a single, secure portal.  
Features to help you control and distribute all your documents include: an easy to use file structure, search, version control, auditing, reporting, and security and permissions management.  
[About The PDMS CDP](#)

**Public Documents**

Document Type: All

Record(s) 1-7 of 7

Name	Description	File Size
Brochure - Manx Grads - flyer_grads	Brochure - Manx Grads - flyer_grads	2.9mb
Brochure - Public Sector Brochure - 2009	Brochure - Public Sector Brochure - 2009	1.2mb
CDP User Manual	Manual for standard users of the CDP	2.8mb
CDP WebDav User Manual	CDP user manual regarding webdav features only	490.6k
eGaminigleaflet	eGaminigleaflet	4mb
MARIS	MARIS	3.1mb
Recipe	asdasdad	19.4k

DEMONSTRATION SYSTEM Controlled Document Portal  
© Copyright PDMS Ltd 2012

#### Notes:

1. If no Documents are marked CDP marked as “Visible without login”, then no documents will be displayed on the Home Page.
2. Visitors to the Home Page cannot view any other documents, or perform any other CDP functions, without logging in to the CDP.

## 2.2 Login, Logoff and Password Recovery

### 2.2.1 Login



The Login link, at the top left of the Home Page, displays the Login page via which, by entry of the Username and Password combination supplied to you in the first instance by your CDP Administrator, you can access the CDP.

The image shows a login form with two input fields: 'Username:' and 'Password:'. Below the fields is a blue button labeled 'Accept and Login'. At the bottom of the form, there is a link: 'Forgotten password? [Click here](#) to recover it using your user name or email address.'

- Notes:
1. At first Login, or on expiry of your Password, you will be prompted to enter a new Password. Your organisation's CDP Security Policy may require that your Password conforms to its Password Security Settings (see **2.3.2 Change Password**).
  2. At first Login, you will be prompted to enter a Memorable Word for use during the forgotten Password process. You can change your Memorable Word at any time (see **2.3.3 Change Memorable Word**)

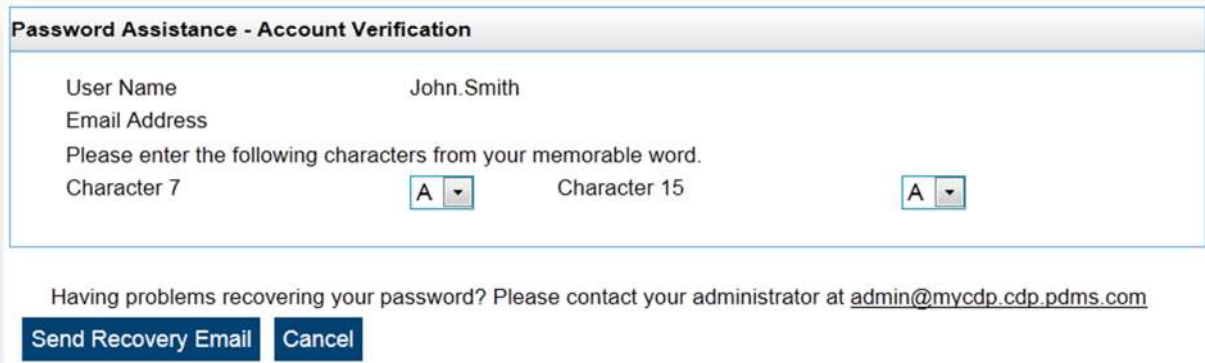
### 2.2.2 Forgotten Password

If you are unable to remember your Password, click the [Click here](#) link. This will open the Password Assistance – Account Details window.

The image shows a window titled 'Password Assistance - Account Details'. It contains the instruction 'Please enter either your username or your email address.' followed by two input fields: 'User Name' and 'Email Address'. At the bottom, there is a text line: 'Having problems recovering your password? Please contact your administrator at [admin@mycdp.cdp.pdms.com](mailto:admin@mycdp.cdp.pdms.com)' and two buttons: 'Next' and 'Cancel'.

Enter either your User Name or Email Address and press the Next command button.

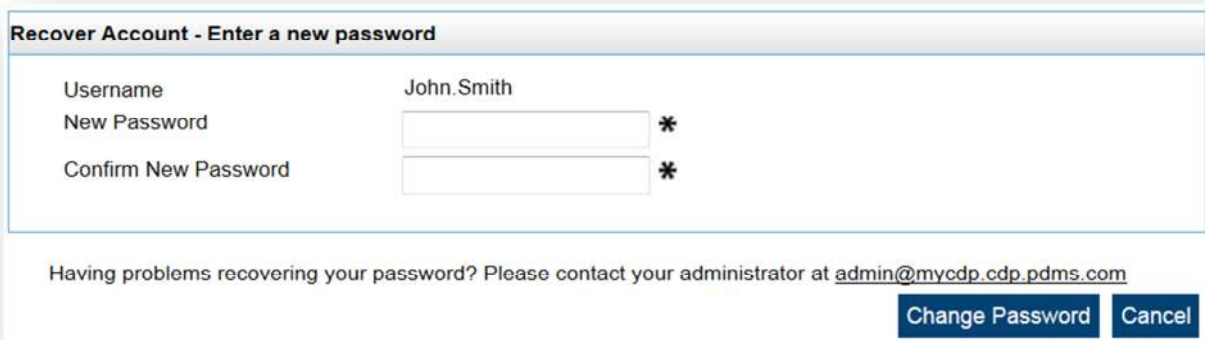
This will open the Password Assistance – Account Verification window.



The screenshot shows a web window titled "Password Assistance - Account Verification". It contains the following fields and text:

- User Name: John.Smith
- Email Address: (empty)
- Please enter the following characters from your memorable word.
- Character 7: A (dropdown menu)
- Character 15: A (dropdown menu)
- Having problems recovering your password? Please contact your administrator at [admin@mycdp.cdp.pdms.com](mailto:admin@mycdp.cdp.pdms.com)
- Buttons: Send Recovery Email, Cancel

Enter the appropriate characters from your memorable word, and press the Send Recovery Email command button. An email will be sent to the email address registered with the CDP for you account. The email will contain a link; clicking on the link will open the Recover Account – Enter a new password window.



The screenshot shows a web window titled "Recover Account - Enter a new password". It contains the following fields and text:

- Username: John.Smith
- New Password: (password field) \*
- Confirm New Password: (password field) \*
- Having problems recovering your password? Please contact your administrator at [admin@mycdp.cdp.pdms.com](mailto:admin@mycdp.cdp.pdms.com)
- Buttons: Change Password, Cancel

Enter and confirm your new Password; note that your organisation's CDP Security Policy may require that your Password conforms to its Password Security Settings (see **2.3.2 Change Password**). Press the Change Password command button. You will then be able to logon using your new Password.

Note: If for any reason you are unable to complete this process, then send an email to your registered CDP Administrator by clicking the link displayed in each window.

## 2.2.3 Log Off

You can exit the CDP from any window in the system by selecting the Log Off link.



## 2.3 MyCDP

The MyCDP menu option displays further menu options to review and change your personal and security information.

The screenshot shows the PDMS logo at the top left. Below it is a navigation bar with links: Home, Document Portal, About, My CDP (highlighted), and Log Off. Under the My CDP link, there are three sub-links: User Details (highlighted), Change Password, and Change Memorable Word. Below this is a form titled 'Account Details'. The form contains the following information:

Individual Title	Mr
First Name	John
Surname	Smith
Email Address	john.smith@mycdp.cdp.pdms.com

At the bottom right of the form is a blue 'Edit' button.

### 2.3.1 User Details

The User Details menu option displays your account details.

If you have permission, you can change these as appropriate by pressing the Edit command button.

### 2.3.2 Change Password

The screenshot shows a form titled 'Change My Password'. It contains three input fields, each followed by an asterisk (\*):

- Old Password
- New Password
- Confirm New Password

At the bottom right of the form is a blue 'Save' button.

To change your Password, click the Change Password menu option.

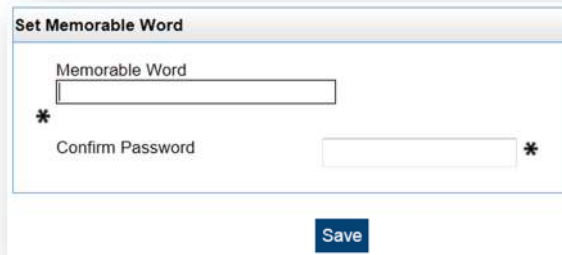
Enter your old (existing) Password, and enter and confirm your new (required) Password twice.

Press the Save command button.

- Notes:
1. Your organisation's CDP Security Policy may require that your new Password conforms to its Password Security Settings. This may mean that:
    - your Password must contain one or more of; a lower and upper case letter, a number, a symbol;
    - you must change your Password after a certain number of days.
  2. When your Password expires, you will automatically be directed to this Change Password window.



### 2.3.3 Change Memorable Word

A screenshot of a web-based dialog box titled "Set Memorable Word". The dialog box has a light blue border and a white background. It contains two text input fields. The first field is labeled "Memorable Word" and is empty. The second field is labeled "Confirm Password" and is also empty. To the left of the "Confirm Password" label is an asterisk (\*), and to the right of the input field is another asterisk (\*). Below the input fields is a blue button with the word "Save" in white text.

Your Memorable Word is used during the forgotten Password process.

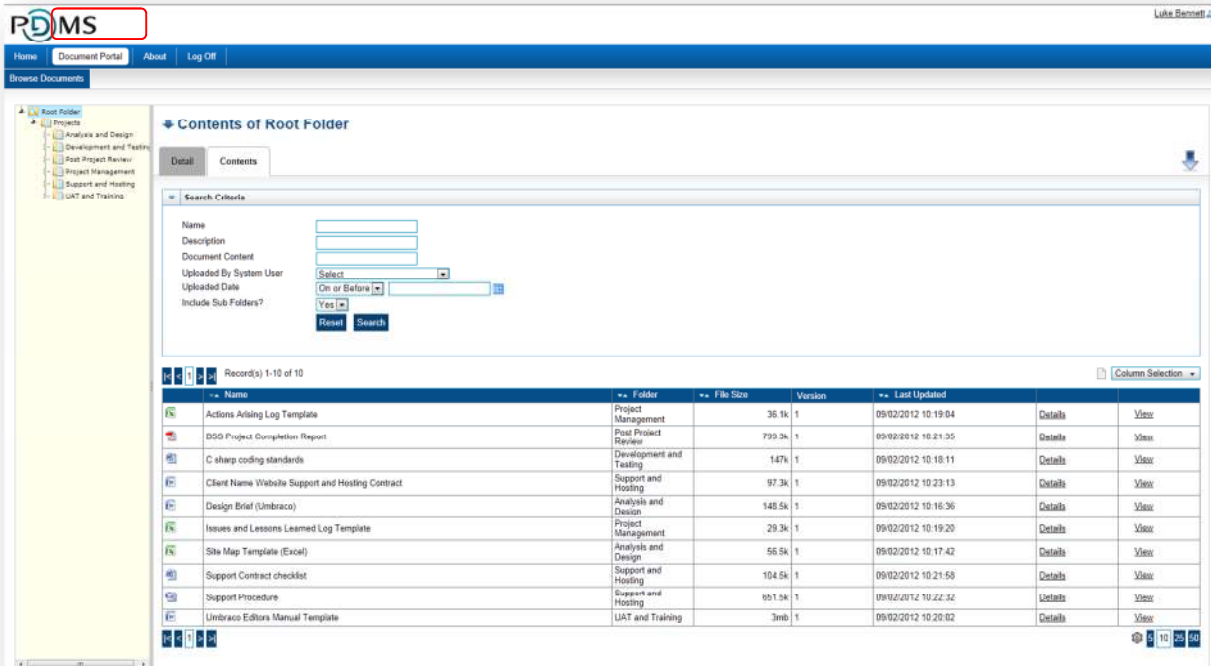
To set/change your Memorable Word, click the Change Memorable Word menu option.

Enter your Memorable Word and your Password, and click the Save command button.

## 2.4 Browsing the CDP

### 2.4.1 Document Portal Page

Once logged in to the CDP, the Document Portal page is displayed. This is split into two sections:



The **left hand side** of the page displays a hierarchical 'tree' structure of the Folders and Documents stored in the system. The Folders and Documents can be navigated, expanded and collapsed either by clicking on them and the arrow icons displayed next to them, or by using the arrow keys on the keyboard. Note that the Folders displayed will be filtered to only those that you have permission to see.

The **right hand side** of the page displays the relevant details of the selected Folder or Document, as described below.

Note that the Document Portal page can be accessed from anywhere in the system by selecting the **Document Portal** link.

## 2.4.2 CDP Navigation Methods

To navigate around the CDP, “left click” once on the tab, folder, icon or link you wish to view.

In the details view on the right hand side, left click the appropriate icon to perform the activity you wish to undertake, including edit a folder, add a folder, delete a folder, upload a document and download changed documents.

A list and descriptions of the icons used in the CDP are provided below.

























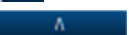

In the tree view on the left hand side, you can also “**right click**”:

- **on a folder** to see and select options to add a sub folder, edit the folder, delete the folder and upload documents to a folder; and
- **on a document** to see and select options to view the document’s history, edit the document’s details, delete the document or replace the document.

Note: The availability of the above described functions to a particular User will depend on the permissions assigned to that User by a CDP Administrator.

## 2.4.3 CDP Icons

The following table describes the meaning of the icons used within the CDP web-application.

Icon	Function	Icon	Function
	Edit Folder		Export to CSV
	Add Sub-Folder		Delete Folder
	Upload Document		Download Changed Documents
	View Document		Edit Document Details
	Replace Document		Delete Document
	Expand		collapse
	Go to First		Go to Last
	Previous Page		Next Page
	Selected Page		Next page of data Ex 2
	Change Sort Order of Column Ascending		Change Sort Order of Column Descending
	Save Preferences		Number of lines per page
	Add Item		Delete Item
	Move Up		Move Down

## 2.5 CDP Folders

The availability of the following functions to a particular User will depend on the permissions assigned to that User by a CDP Administrator.

### 2.5.1 Folder Contents / Document Lists

The Contents tab for a particular folder will provide a list of the Documents it contains, along with Document Search features.

The following image shows the contents of a Folder in the CDP, or, in other words, a “Document List”:

Name	Folder	Version	Last Updated	Details	View
BS EN ISO 9001:2008	Standard Documents	2008	07/02/2012 11:55:00	<a href="#">Details</a>	<a href="#">View</a>
ISO Standards Overview – Sales	Staff Training and Information	1	07/02/2012 12:03:38	<a href="#">Details</a>	<a href="#">View</a>
ISO Standards Overview	Staff Training and Information	1	07/02/2012 12:08:15	<a href="#">Details</a>	<a href="#">View</a>
4.2.3 Controlled Document Content and Layout	Procedures Processes	1	07/02/2012 12:58:28	<a href="#">Details</a>	<a href="#">View</a>
ISO IEC 27001	Standard Documents	1	07/02/2012 13:06:23	<a href="#">Details</a>	<a href="#">View</a>
LICENSING OF WASTE DISPOSAL REGULATIONS 1990	Manx Legislation	1990	07/02/2012 13:25:19	<a href="#">Details</a>	<a href="#">View</a>
PPG2 - Oil Storage	UK Legislation	August 2011	07/02/2012 13:27:18	<a href="#">Details</a>	<a href="#">View</a>
Lead Developer	Job Descriptions	1	07/02/2012 14:18:48	<a href="#">Details</a>	<a href="#">View</a>
Project Manager	Job Descriptions	1	07/02/2012 14:18:51	<a href="#">Details</a>	<a href="#">View</a>
PDMS Application Form	Application, Consent and Vetting Forms	1	07/02/2012 14:36:22	<a href="#">Details</a>	<a href="#">View</a>

Unless otherwise specified, all Document Lists, as illustrated above, will:

- Include navigation buttons for “First Page”, “Previous Page”, “Next Page” and “Last Page”;
- Include page number links to allow direct navigation to particular pages;
- Include an indication of the total number of rows available for viewing in the list, e.g. “Records 1 – 10 of 432”;
- Include the ability to change the sort order of the content within certain columns;
- Display 10 rows per page by default, but will allow the specification of different page sizes of 5, 10, 25 or 50 rows;
- Allow different columns to be shown or hidden using the “Column Selection” drop down list, by “checking” or “un-checking” the box next to the column heading and clicking the “Apply” button.


Note that your current column and sort selections can be saved by clicking the icon next to the rows per page selector. Next time you log in to the CDP, the list screen will default to these saved settings.

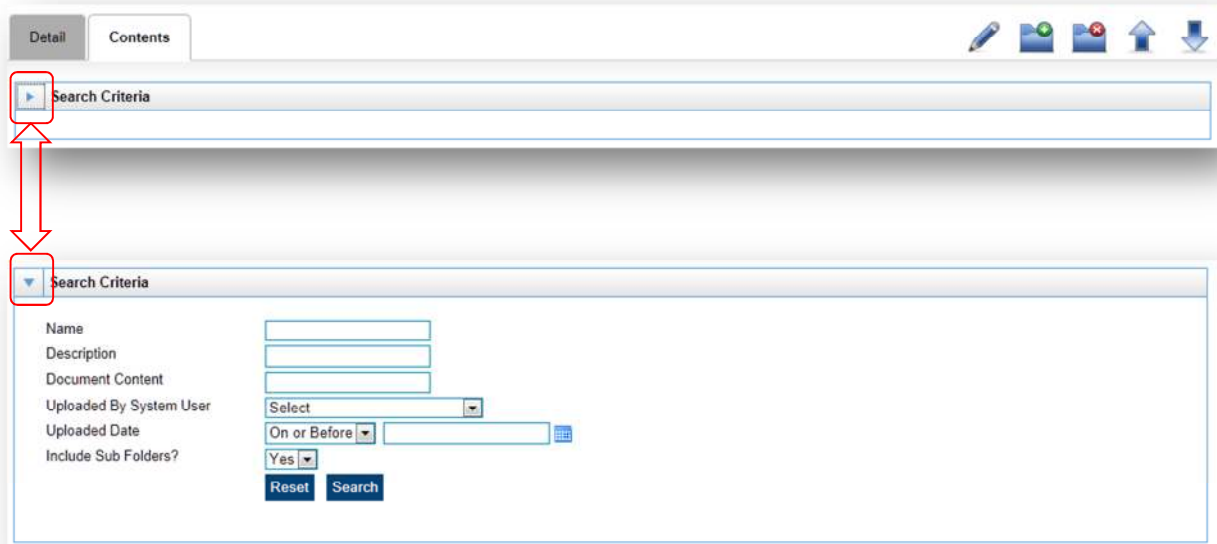
Column Selection


- ☒ - Icon
- ☒ - Name
- ☐ - Version Format
- ☒ - Filename
- ☐ - Short Description
- ☐ - Long Description
- ☒ - Version Comment
- ☒ - Folder
- ☒ - File Size
- ☒ - Version
- ☐ - Last Updated
- ☐ - Last Updated By
- ☒ - Details

Apply

## 2.5.2 Search Functions

When the list of documents in a folder is viewed, by default the search criteria pane will be displayed in its collapsed state. To use the search  controls, click on the command to expand the search pane and reveal the search criteria:

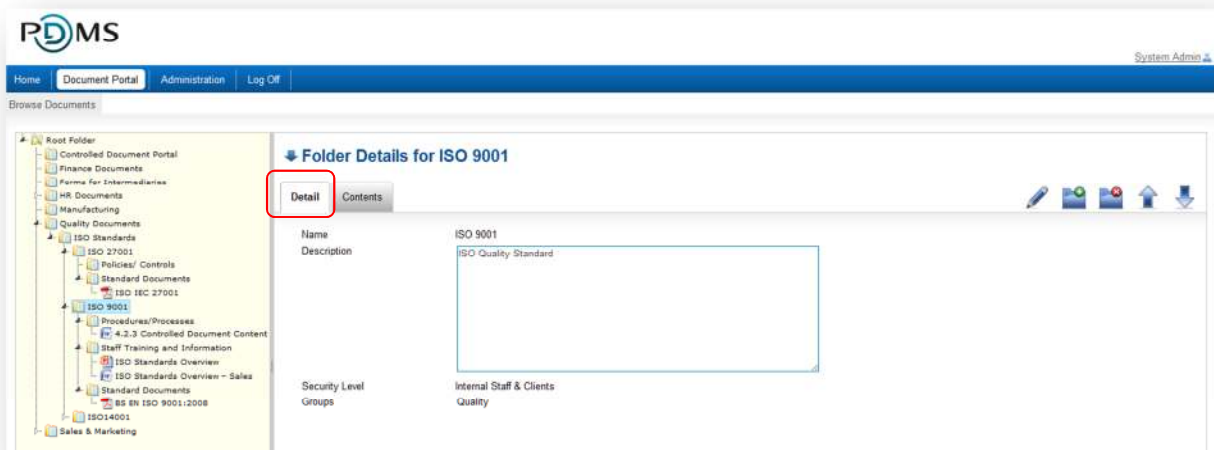


To collapse the search pane, click on  the command.

More information on the features of the search is provided in the Searching for Documents section below.

## 2.5.3 Viewing Folder Attributes

The attributes of the selected Folder can be viewed by selecting the **Detail** tab.



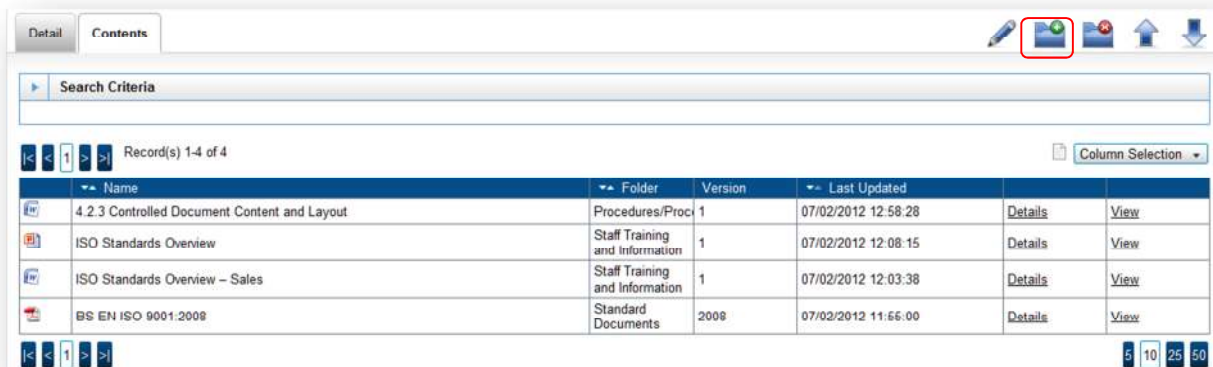
## 2.5.4 Adding a Sub-Folder

There are two ways to add a sub-folder to the currently selected Folder. Either:

1. Right click on the folder in the tree view and choose the “Add Sub Folder” option from the pop-up menu that is displayed; or



2. Select the “Add Sub Folder” command button that is displayed in the right hand pane.



The Add Sub-Folder page will be displayed to allow you to enter the details of the new sub-

↓ Add sub folder to : ISO 9001

Detail Contents

Name \*

Description \*

Security Level \*

Groups \*

Please Select

Quality

Save Cancel

folder.

The information/fields required for creation of the new folder are listed in the table below; mandatory fields are marked with an asterisk as shown above.

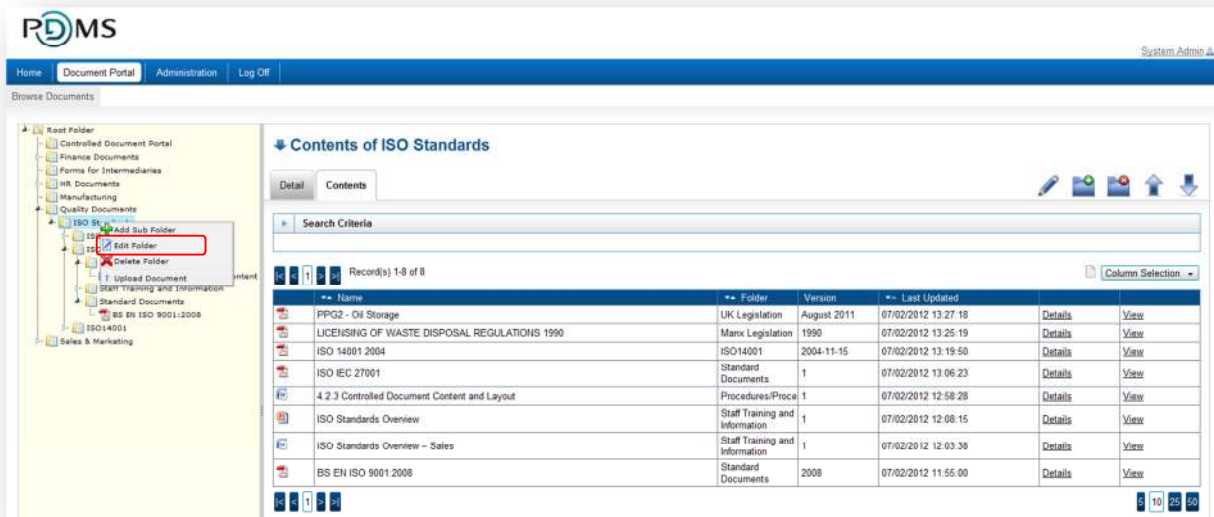
Field	Details	Notes
Name	The name of the sub-folder as it is to appear in the tree.	Folders within a parent folder must be unique. Maximum length = 100 characters.
Description	A longer description of the purpose of the folder.	Maximum length = 2000 characters
Security Level	The level of user that the contents of the folder should be available to.	This security level cannot be lower than that of any of its ascendant/ higher level folders (parent, grandparent etc.).
Groups	These are your functional business groups e.g. Finance, Human Resource, etc. These groups can then be used on the folders to restrict access in conjunction with user clearance	Select from the list of available groups Additional groups can be set up by your CDP administrator

When all details are entered, select Save. The new folder will be created and appear in the tree on the left of the screen.

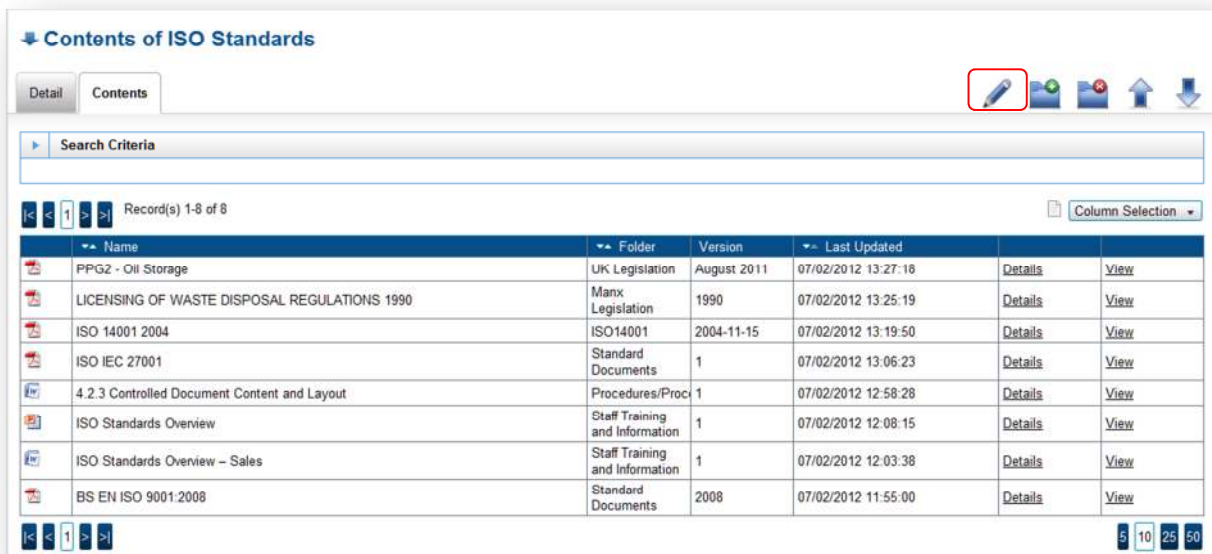
## 2.5.5 Editing a Folder's Details

There are two ways to add a sub-folder to the currently selected Folder. Either:

1. Right click on the folder in the tree view and choose the “Edit Folder” option from the pop-up menu that is displayed; or



2. Select the “Edit Folder” command button that is displayed in the right hand pane.



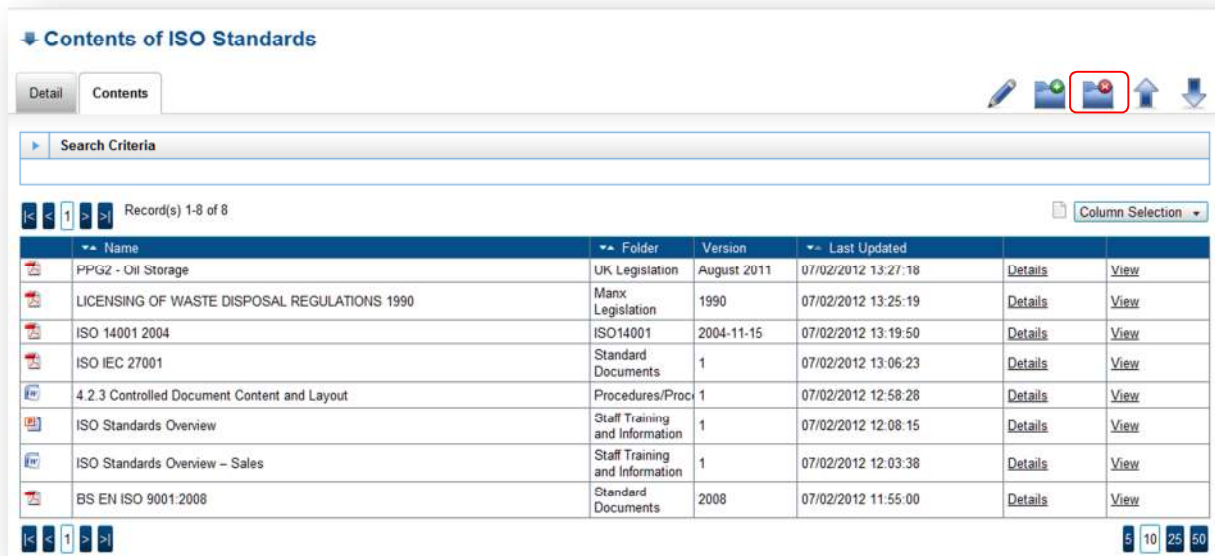
The folder details will be shown and can be edited. The edited fields must still comply with the validation rules described in the Adding a Sub-Folder section of this manual; e.g. the security level will be validated to ensure that it is no lower than that of any of the folder's ascendants.



## 2.5.6 Deleting a Folder

There are two ways to delete a sub-folder from the currently selected Folder. Either:



1. Right click on the folder in the tree view and choose the “Delete Folder” option from the pop-up menu that is displayed; or
2. Select the “Delete Folder” command button that is displayed in the right hand pane.

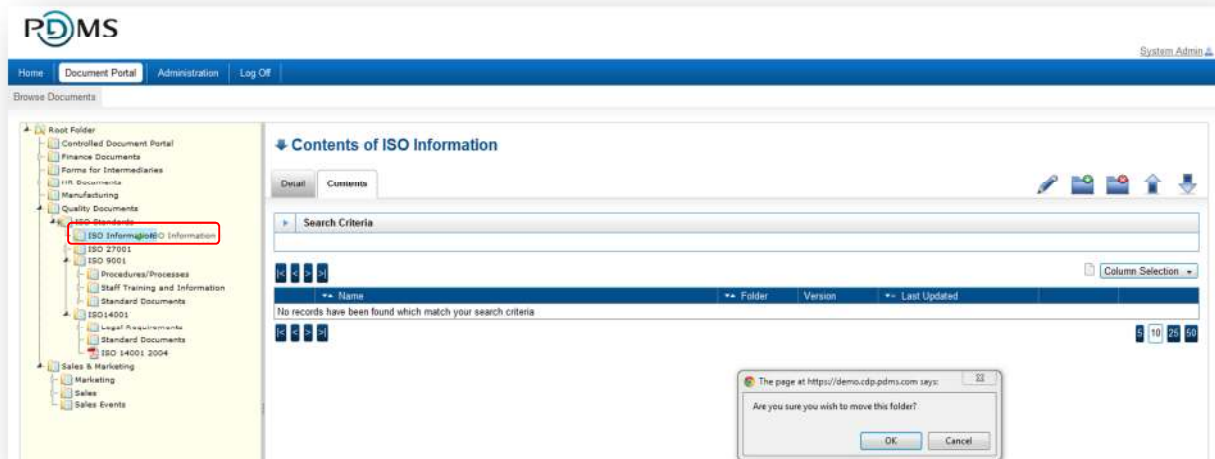


A confirmation message will be shown, explaining that all the Documents contained in the folder will be deleted, with a list of the names of those documents. Click the “Confirm” button for the deletion to proceed.

**Note:** A Folder cannot be deleted if it contains sub-folders.

## 2.5.7 Moving a Folder

A Folder can be moved to another parent Folder by dragging-and-dropping it within the tree view. Whilst it is being dragged, a  icon is displayed to indicate that the Folder cannot be dropped into the underlying Folder due, for example, to security settings. The icon changing to a  indicates that the Folder can be dropped into the underlying Folder. Prior to moving the Folder, a confirmation dialogue will be displayed.



The following rules apply to security levels when moving folders:

- If the Folder being moved has the same or a higher security level than its new parent Folder, it will retain its original security level settings.
- If the Folder being moved has a lower security level than its new parent Folder, its security level will be updated to match the security level of the new parent Folder (as Sub-Folders cannot have a lower security level than a parent Folder).
- The above rules also apply to any Sub-Folders of the Folder being moved.

When the Folder is moved, the tree view will automatically refresh to display the new Folder structure.

Note that Folder names must be unique within a parent Folder. A warning will be displayed if a Folder of the same name already exists in the new parent Folder, and the move will be prevented. The name of one of the Folders will need to be changed to allow the move.

## 2.6 Documents in the CDP

The availability of the following functions to a particular User will depend on the permissions assigned to that User by a CDP Administrator.

### 2.6.1 Browsing Documents

When a Folder is selected from the tree, the right hand side of the Document Portal page displays the **Contents** tab containing a list of the Documents contained within the Folder **and**

**PDMS** System Admin

Home | Document Portal | Administration | About | Log Off

Browse Documents

**Contents of ISO 9001**

Detail | Contents

Search Criteria




Record(s) 1-4 of 4

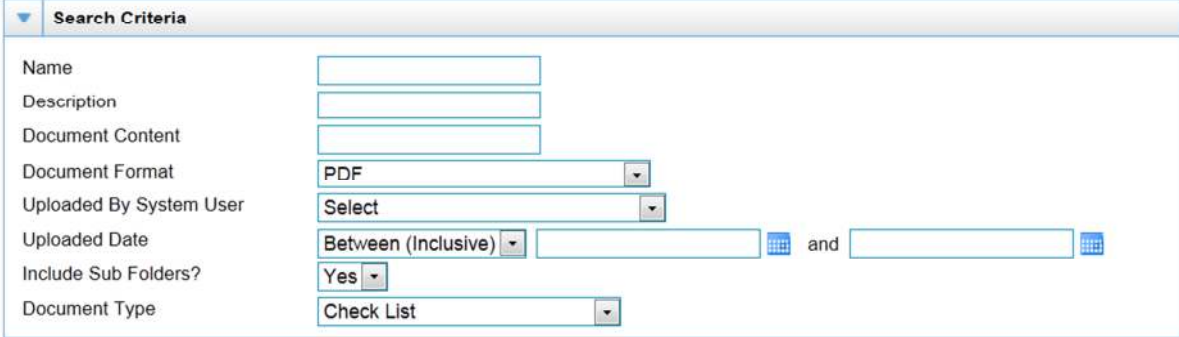
Name	Filename	Version Comment	Folder	File Size	Version
4.2.3 Controlled Document Content and Layout	4.2.3 Controlled Document Content and Layout	First version	Procedures Processes	167.5k	1
ISO Standards Overview	ISO Standards Overview	First Version	Staff Training and Information	2.6mb	1
ISO Standards Overview - Sales	ISO Standards Overview - Sales	First Version	Staff Training and Information	52k	1
BS EN ISO 9001_2008	ISO 9001 2008	November 2008	Standard Documents	406.4k	2008

its sub-Folders.

The Documents can also be seen in the hierarchical folder tree-view in the left hand side.

## 2.6.2 Searching for Documents

The **Search Criteria** pane of the **Contents** tab can be used to search the Documents contained within a Folder and, if specified, its Sub-Folders.  Clicking on the  command will reveal the Search Criteria controls; clicking on the  command will hide them.



The criteria on which a search will be performed are:

- **Name** – the whole or a part of the Document Name;
- **Description** – the whole or a part of either the Short or Long Description;
- **Document Content** – a word or phrase that forms a part of the Content of the Document (note: not all Document formats can be indexed);
- **Document Format** – the format (e.g. PDF) of the current version of the Document;
- **Uploaded By System User** – the User who uploaded the Document;
- **Uploaded Date** – a Date prior to or subsequent to which the Document was uploaded;
- **Include Sub Folders** – whether Documents from sub-folders are to be included in the results;
- **Document Type** – the type of document as selected by the user.

Note: The Search Criteria may include controls for any Additional Fields specific to your instance of the CDP as set up by your CDP Administrator.

## 2.6.3 Viewing Information about a Document

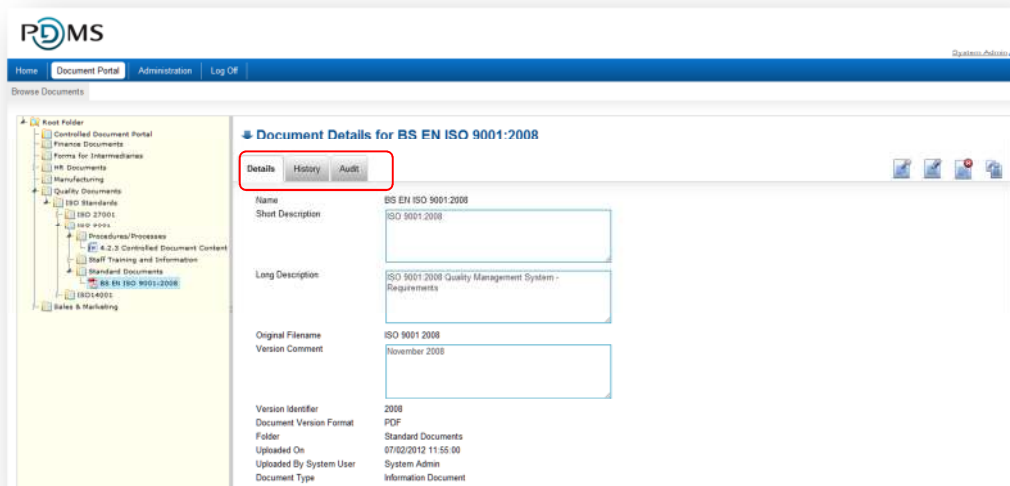
The information about a Document can be viewed by either clicking on the Document in the folder tree-view, or by selecting the “Details” option displayed against the Document in the Folder contents list.

The screenshot shows the PDMS Document Portal interface. The top navigation bar includes links for Home, Document Portal, Administration, About, and Log Off. The 'Document Portal' tab is active. Below the navigation bar, there is a 'Browse Documents' section. On the left, a folder tree shows the hierarchy: Root Folder > Quality Documents > ISO Standards > ISO 9001. The main content area is titled 'Contents of ISO 9001'. It has two tabs: 'Detail' and 'Contents'. The 'Contents' tab is active. Below the tabs, there is a search criteria field and a table of documents. The table has columns for Name, Filename, Version, Comment, Folder, Size, and Version. The first document, '4.2.3 Controlled Document Content and Layout', has its 'Details' link highlighted with a red box. The table also includes pagination controls at the bottom.

Name	Filename	Version	Comment	Folder	Size	Version	
4.2.3 Controlled Document Content and Layout	4.2.3 Controlled Document Content and Layout	First version		Procedures Processes	167.5k	1	<a href="#">Details</a>
ISO Standards Overview	ISO Standards Overview	First Version		Staff Training and Information	2.6mb	1	<a href="#">Details</a>
ISO Standards Overview – Sales	ISO Standards Overview - Sales	First Version		Staff Training and Information	52k	1	<a href="#">Details</a>
BS EN ISO 9001 2008	ISO 9001 2008	November 2008		Standard Documents	406.4k	2008	<a href="#">Details</a>

Depending on your permissions, the information about the document is displayed on tabs, including:

- **Details** – including information supplied by the User who uploaded the Document, which can subsequently be edited (see below);
- **History** – a historical list of the document versions;
- **Audit** – information about who has performed what actions on the Document.



### 2.6.3.1 Document Details

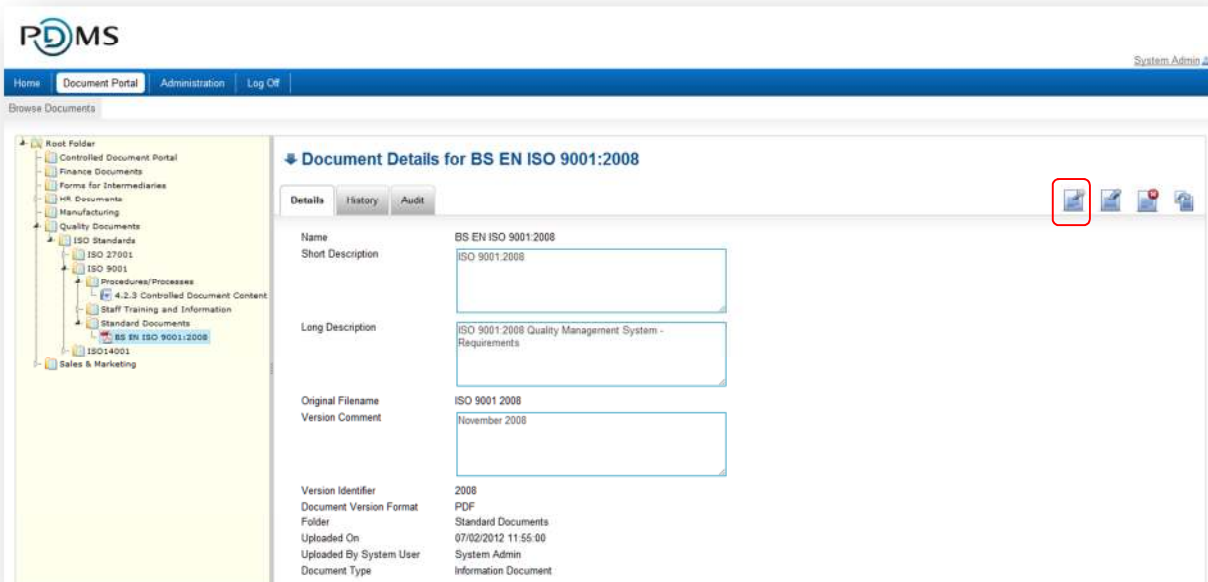
The Document Details, as displayed in the image above, are either provided by system Users, or automatically set by the system as follows.

- Provided by system Users:
  - **Name** – an identifier for the document, which may or may not be the same as the name of the original file that was uploaded;
  - **Short Description** – information about the document;
  - **Long Description** – more information about the document;
  - **Version Comment** – information relating to this particular version of the document;
  - **Version** – information identifying this particular version of the document;
  - **Document Type** – the type of document as chosen by the uploader;
  - Visible without login – specifies whether the Document will appear on the CDP Home Page and can be viewed by unauthenticated Users;
  - Any other **Additional Fields** specific to your instance of the CDP as set up by your CDP Administrator.
- Automatically set by the system:
  - **Original Filename** – the name of the file that was uploaded;
  - **Document Format** – the file format of the document version (e.g. PDF. DOC) (note that the file format may be different for different versions of the same Document);
  - **Folder** – the CDP Folder into which the document version was uploaded;
  - **Uploaded On** – the date and time the document version was uploaded;
  - **Uploaded By System User** – who uploaded the document version.

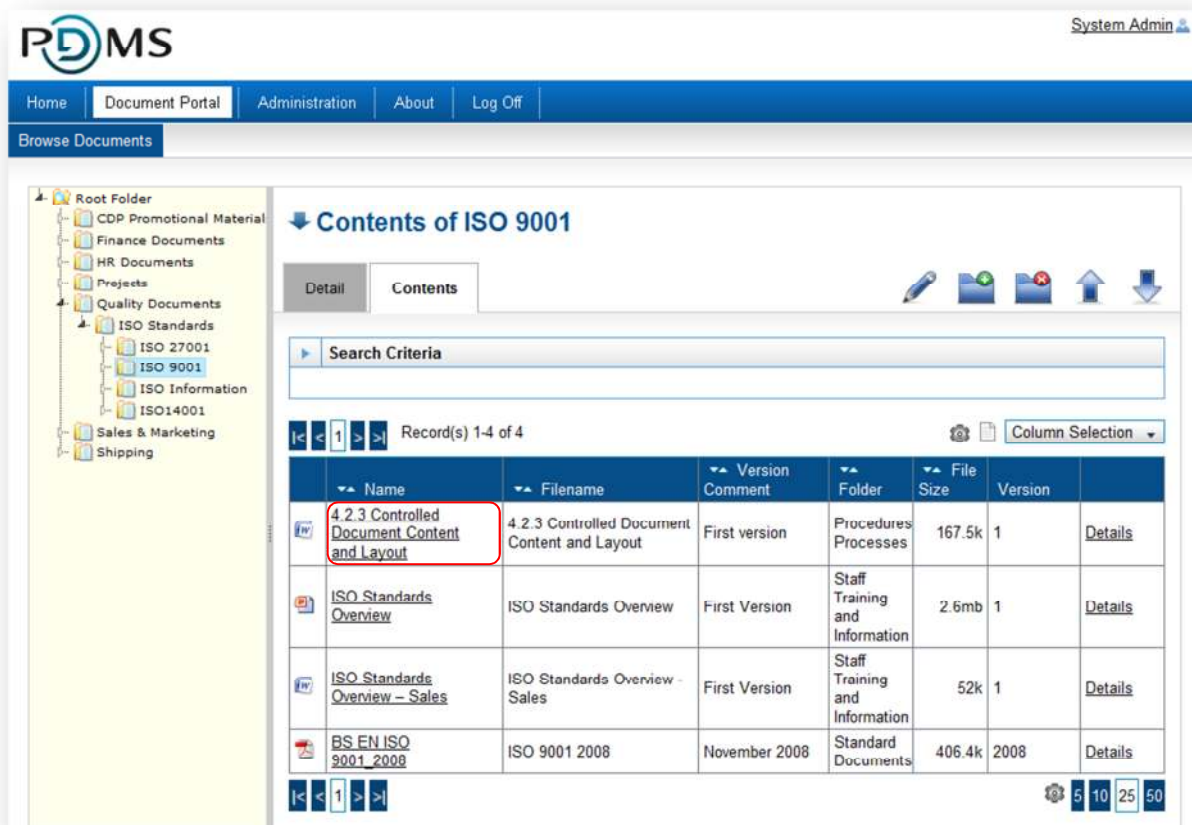
- **Public Download Link** – URL which can be given to non-authenticated users to access the document (N.B. this only appears if the document is marked as “Visible without login”).

## 2.6.4 Viewing a Document

A Document can be viewed by clicking the “View Document” command button that is displayed in on the Document Details screen when a Document is selected in the tree-view.



Clicking the document name in the Folder Contents view will also download the document.





Where the document is downloaded to will depend on your computer settings (e.g. you may be prompted for a location or all documents may be downloaded to your default “Downloads” folder). The appropriate application can then be used to open the document e.g. Microsoft Word or Adobe Acrobat Reader.

## 2.6.5 Uploading a Document

A new Document is uploaded to the CDP by selecting the desired Folder in the tree-view and clicking the “Upload Document” command button displayed in the right hand pane, resulting in the display of the **Upload Document** pane.

Clicking the **Browse** command button will result in the display of a “Choose File to Upload” (or similar) dialogue, allowing you to choose the file to upload. Then enter the User specified **Document Details** (see above) and click the **Save** command button.

### Notes:

1. The Name and Description attributes are used by the CDP Search functions, so set their values appropriately.
2. Depending on your organisations policy, a maximum file size may have been set. If so, this will be displayed on the **Upload Document** pane.



## 2.6.6 Editing a Document's Details

A Document's details can be changed by clicking the "Edit Document Details" command button displayed in the right hand pane.



The User specified **Document Details** (see above) can be changed as required and saved by clicking the **Save** command button.

**Note:**Editing a Document's details will not create a new document version, but will create an audit record.

## 2.6.7 Replacing a Document

The current version of a Document can be replaced by the clicking the "Replace Document" command button displayed in the right hand pane, resulting in the display of the **Replace Document** pane.

### ↓ Replace Document ISO 14001 2004

Please ensure that your document is no larger than 4MB and has been virus checked.

Select File

\* Name  \*

Short Description  \*

Long Description

Version Comment

Previous Version

Version

Document Type  \*

Again, clicking the **Browse** command button will result in the display of a “Choose File to Upload” (or similar) dialogue, allowing you to choose the replacement file to upload. The User specified **Document Details** (see above) can be changed as required, and saved by clicking the **Save** command button.

**Note:** A Document in one format can be replaced by a Document in another.

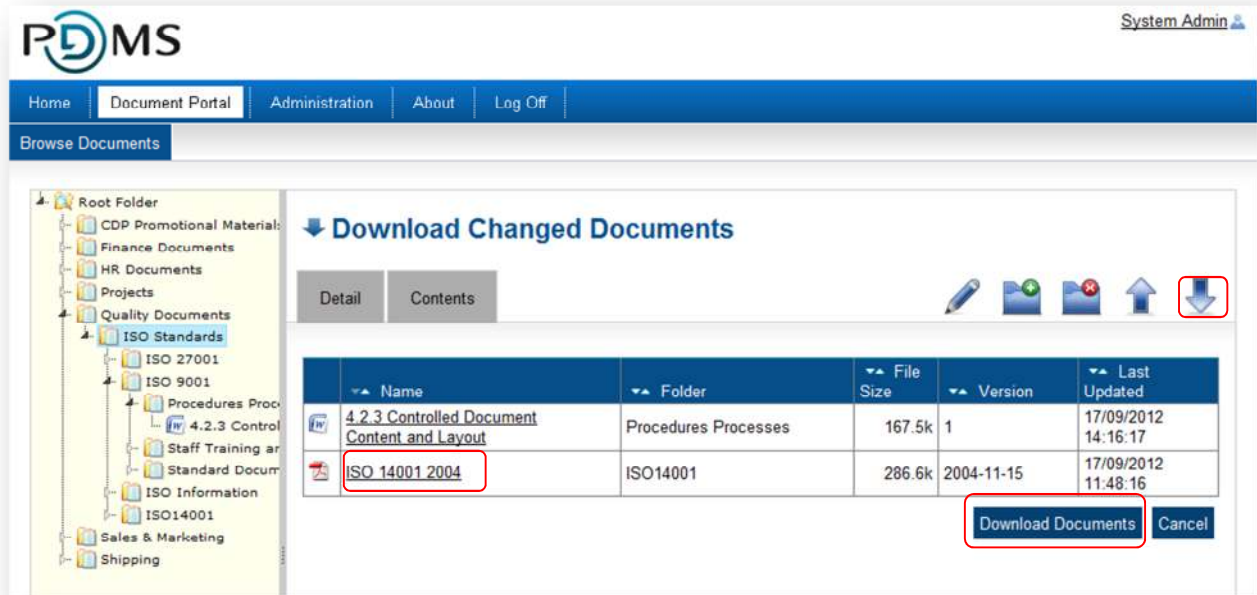
## 2.6.8 Deleting a Document

A Document can be deleted by the clicking the “Delete Document” command button displayed in the right hand pane; confirmation of the delete will be required.



## 2.6.9 Downloading Changed Documents

The Download Changed Documents function provides the facility by which you can view all the Documents you have previously downloaded and which have subsequently been updated in the CDP with their later versions.



Select a Folder in the tree-view and click the “Download Changed Documents” command button on the right hand pane. The **Contents** pane will list the Documents in the currently selected folder *which you have previously downloaded, and which have been replaced by a new version since your last download*.

You can download these documents individually (by clicking the Document Name).

Clicking the Download Documents command button displayed at the foot of this list will create a ZIP file containing all the listed documents which you can save to your local disk, or open in your default ZIP handling application.

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## 3 CDP Personal

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### 3.1 Introduction to CDP Personal

CDP Personal is an application which allows you to download and store documents locally on your computer in a secure, encrypted repository, providing you with access to these documents whilst not connected to the Internet.

CDP Personal:

- Provides you with access to your CDP Documents when an Internet connection is not available;
- Automatically synchronises with your CDP site when an Internet connection is available to ensure the correct Documents are stored locally;
- Only stores locally the Folders and Documents you have permissions to view;
- Can be configured to automatically check and update the Folders and Documents to a schedule set by you;
- Displays a status bar showing the last time it synchronised with your CDP site;
- Will automatically update to the latest version of the application as and when these become available.

The following sections provide further information on how to install, configure and use CDP Personal.

## 3.2 Installation of CDP Personal

CDP Personal will run on a Windows XP Professional, a Windows Vista or a Windows 7 machine.

It requires the following:

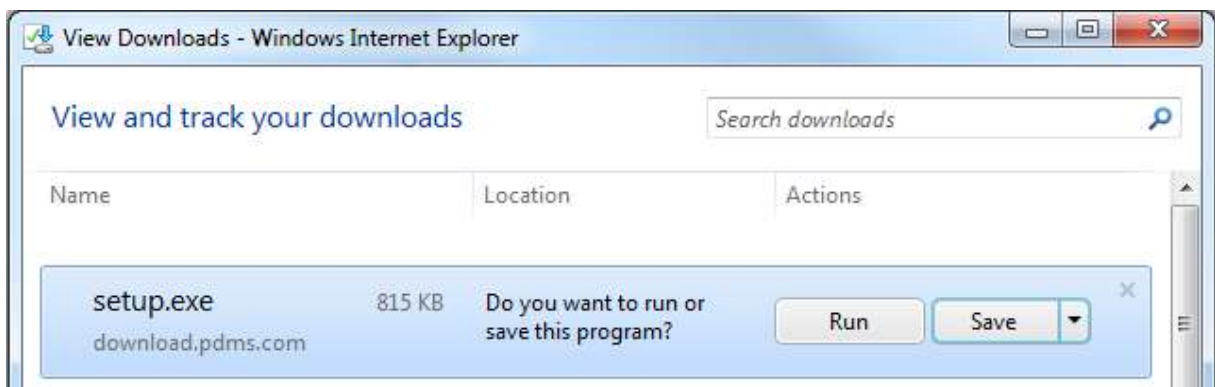
- Windows Installer 4.5
- Microsoft .NET Framework 4 Client Profile (x86 and x64)
- SQL Server Compact 4.0

which, if not already in place, will be installed by the Installation process:

To install CDP Personal, open your browser and navigate to the following URL:

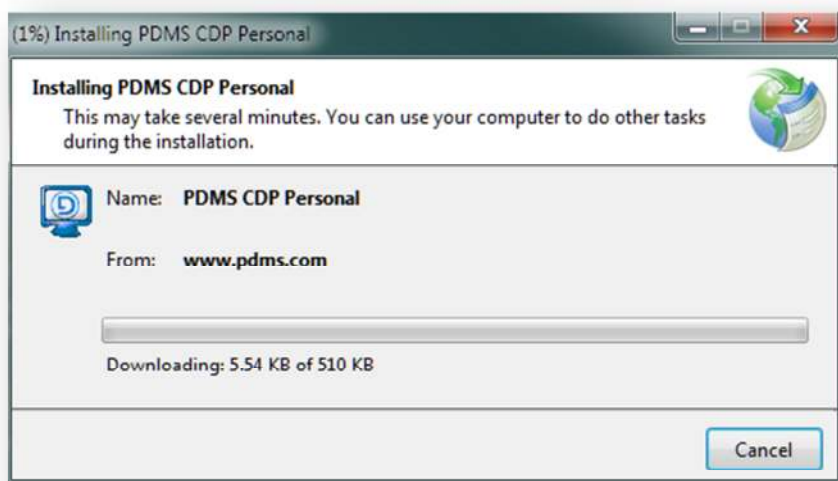
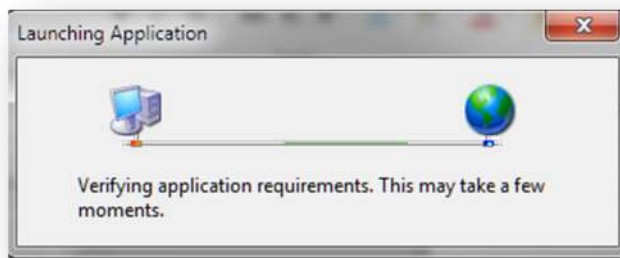
<http://download.pdms.com/cdppersonal/setup.exe>

The subsequent process will vary depending on your operating system version and security policies, but an example is now described. You may require the assistance of your network Administrator to complete the installation.

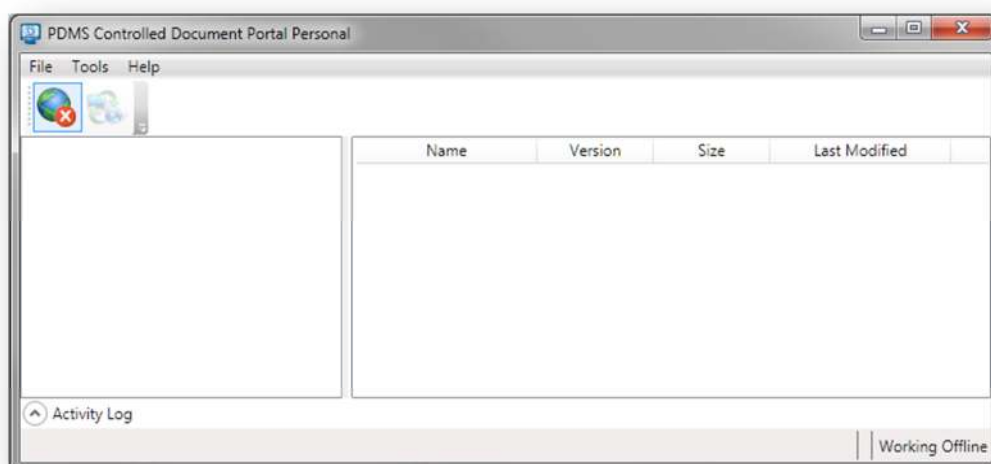


Choose Run in response to the above, or a similar, dialog.

The progress of your installation will be shown in dialogs similar to the ones below.



When complete you will see the CDP Personal application open to show its main window.



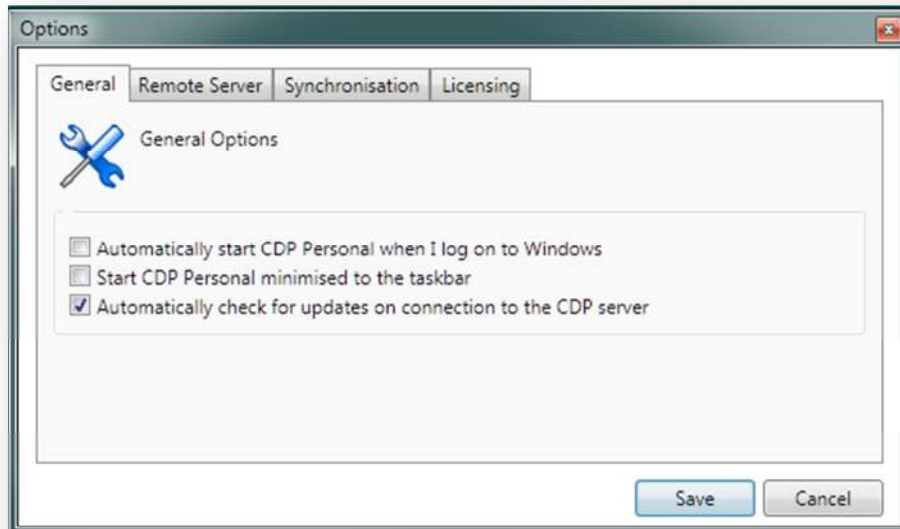
At this point, CDP Personal is installed on your computer, and can be accessed from the Start Menu at:

**All Programs > PDMS > Controlled Document Portal > PDMS CDP Personal**

However, in order to connect it to your CDP web-application, it requires configuring and licencing.

## 3.3 Configuration of CDP Personal

To configure the CDP Personal, choose the “Tools” menu in the CDP Personal application (as per the image above) and select “Options”. You will then see the dialog box as shown in



the image below.

The following sections describe how to update each of the four tabs – General, Remote Server, Synchronisation and Licensing.

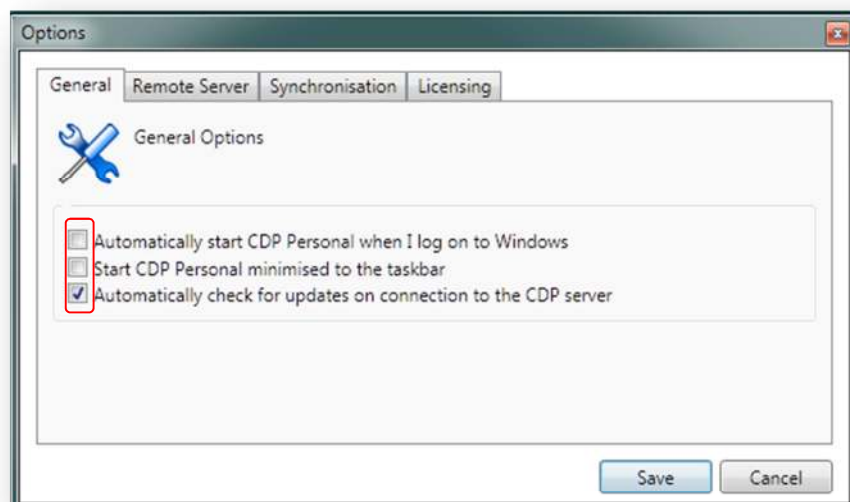
### 3.3.1 General CDP Personal Settings

The “General” tab contains the following settings, detailed with their default settings:

- Automatically start CDP Personal when I log on to Windows – Unchecked
- Start CDP Personal minimised to the taskbar – Unchecked
- Automatically check for updates (to Documents) on connection to the CDP server – Checked

To change these settings according to your own preferences, check/uncheck the checkbox next to the appropriate option(s) and click “Save”.

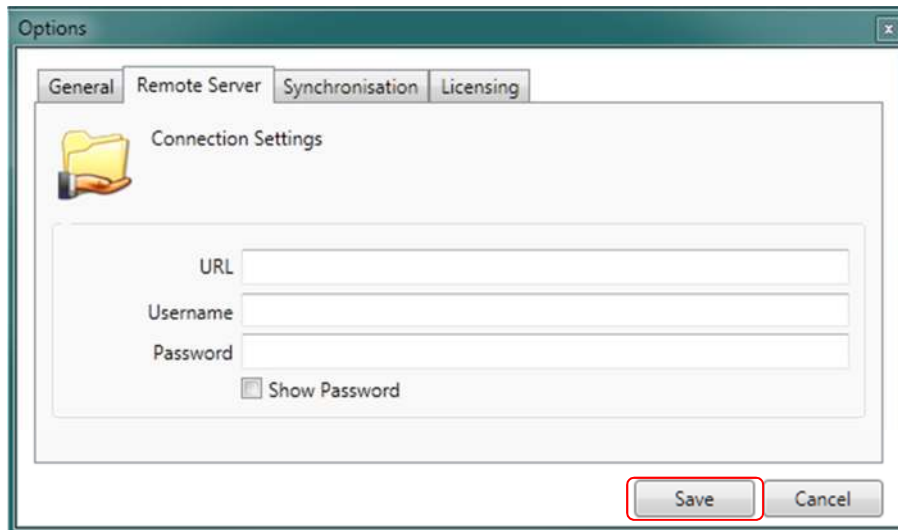
These settings should be reviewed/adjusted after installation, but can be revisited and



edited at any future time.

### 3.3.2 Remote Server Connection Settings for CDP Personal

The “Remote Server” tab is where CDP Personal needs to be configured with the information necessary to access the CDP web application:



The dialog box shown above should be updated as follows:

- **URL** – Enter the URL that CDP Personal will use to connect to the CDP, that is the URL that you use to access your CDP with the extension /webdav/ added, for example:  
<https://mycdp.cdp.pdms.com/webdav/>
- **Username** – Enter the user name you use to access the CDP website;
- **Password** – Enter the password you use to access the CDP website.

Click “Save” to save this configuration information.

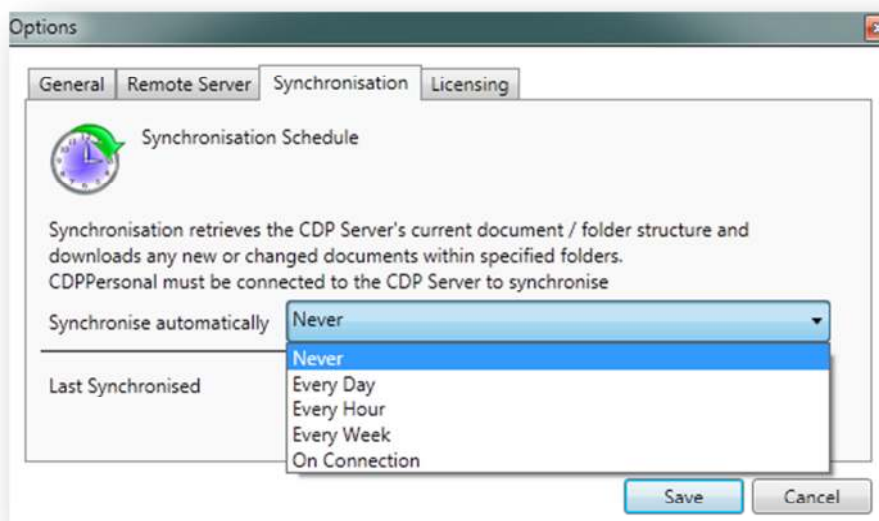


### 3.3.3 CDP Personal Synchronisation Schedule

The “Synchronisation” tab controls how often CDP Personal will download updated Documents from your CDP web application.

The synchronisation frequency options available are:

- Never
- Every Day
- Every Hour
- Every Week
- On Connection



If left at the default option of “Never”, then synchronisation with your CDP web application you will have to be performed manually (see the **CDP Personal Menu/Tools** section below).

Whichever option is chosen, synchronisation will only be performed whilst CDP Personal is running.

**Notes:**

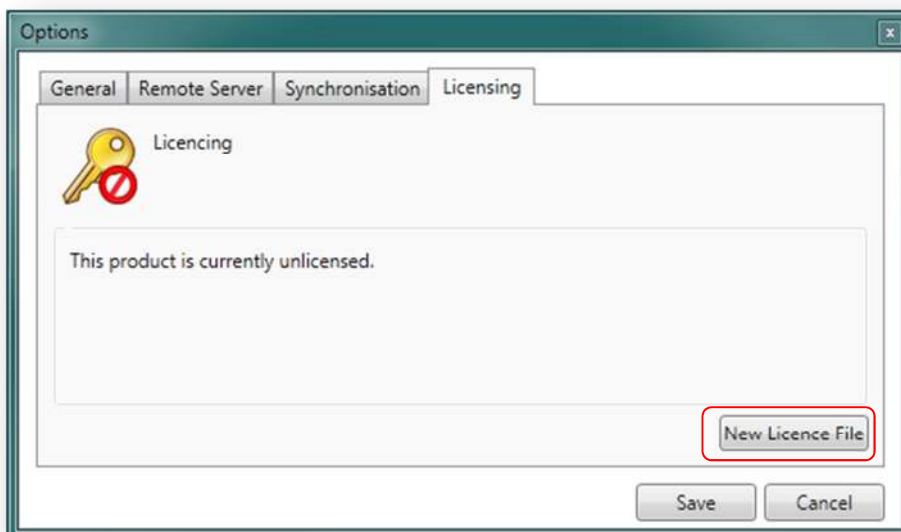
1. If no Documents have been updated to your CDP web application since CDP Personal last synchronised, then no data will be transferred.
2. Consideration should be given to your connectivity to your CDP web application when selecting the synchronise schedule.

### 3.3.4 CDP Personal License

The “Licensing” tab is where you install the CDP Personal licence ‘key’. You will need to request a Licence, which is a long series of apparently random letters and numbers, from your CDP Administrator.

Once you have received a licence:

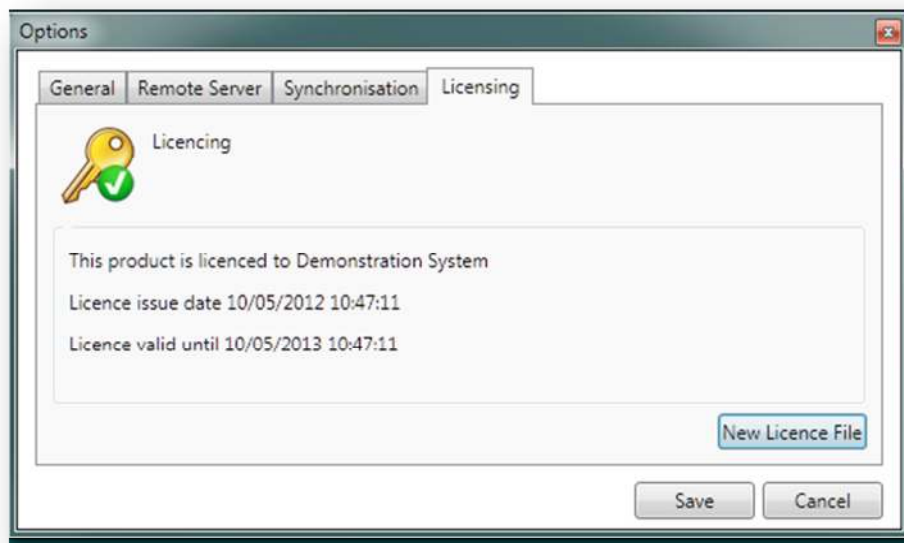
1. Copy the Licence provided to you by your CDP Administrator to your Windows Clipboard.
2. Click the “New Licence File” button.



3. Using the “Paste” button, paste the copied contents into the “Licence Entry Box” and click “Save”.



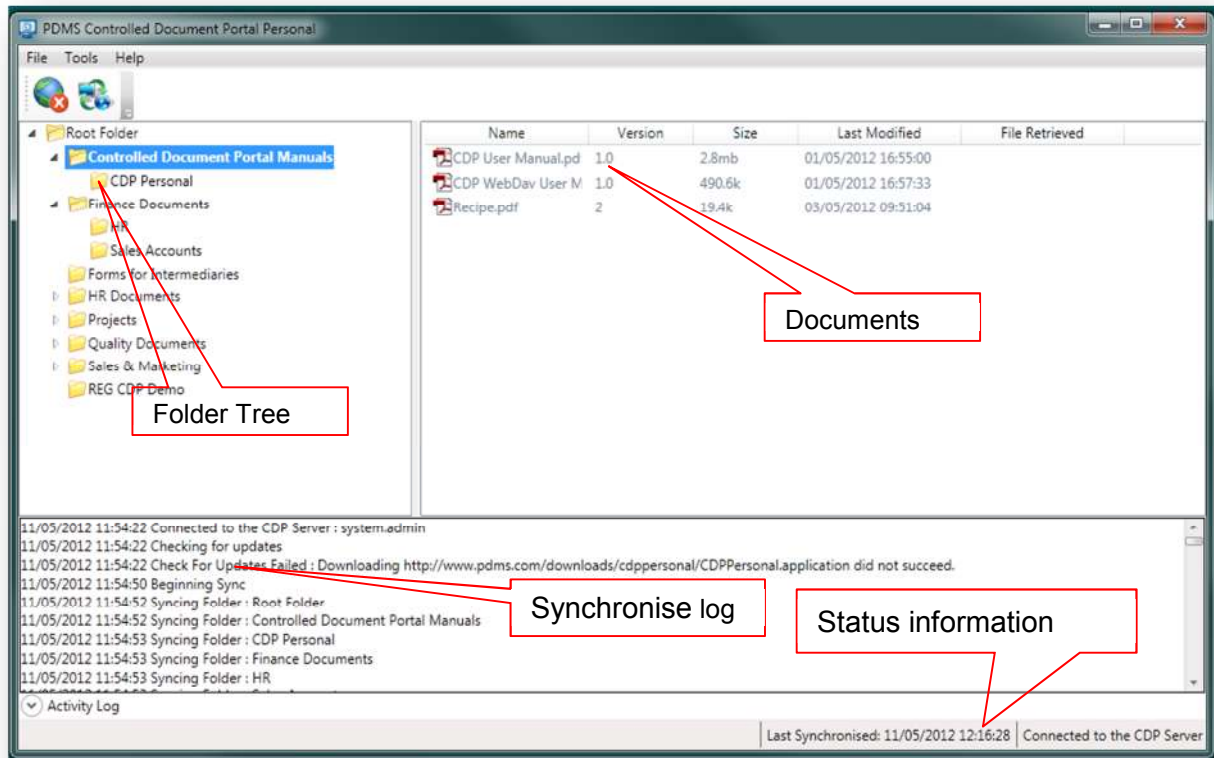
This completes the licencing of the CDP Personal. The Licence details can be viewed at any time by selecting the Licensing tab.



**Note:** The CDP Personal Licence has an expiry date, which should be noted.

### 3.4 CDP Personal Main Window

The CDP Personal main window is laid out in a similar way to the CDP web application. On the left side you see the **Folder Tree** and on the right side of the window you see the



**Documents** area.

At the top left of the window are two command buttons:



Connects and dis-connects CDP Personal with to/from your CDP web-application (see **File|Work Offline**, below).



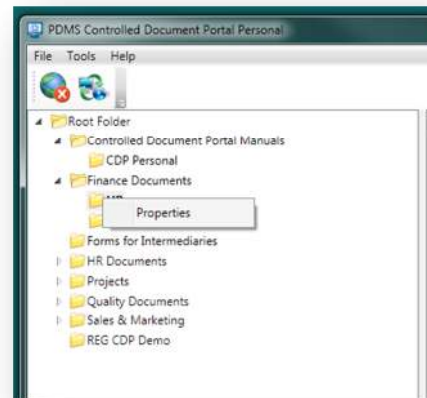
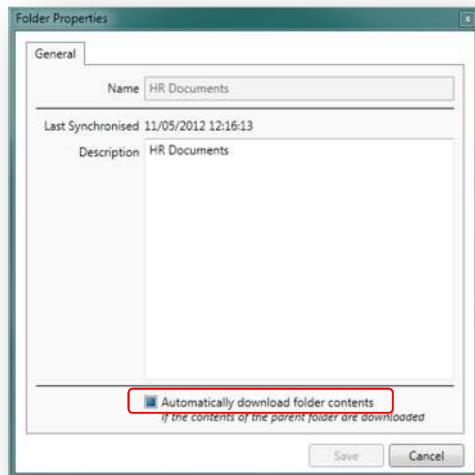
When connected to your CDP web-application, synchronises the Document information and Folder structure from CDP web-application (see **Tools|Synchronise**, below). Note that this **does not** download the Documents themselves.

At the bottom of the window is an expandable “**Activity Log**” which can be used to check which documents have been synchronised. Click the “Up” arrow to expand the Activity Log window, and the “Down” arrow to minimise it.

The **Status Bar** at the very bottom right of the main window confirms the date and time of the last synchronisation with the central CDP, and whether CDP Personal is currently “Connected to the CDP Server” or “Working Offline”.

### 3.4.1 Configuring a Folder for Automatic Download

A Folder can be configured to automatically download the Documents it contains when CDP Personal is connected to your CDP web application. To do this, right click on the Folder in the tree-view and choose **Properties**.

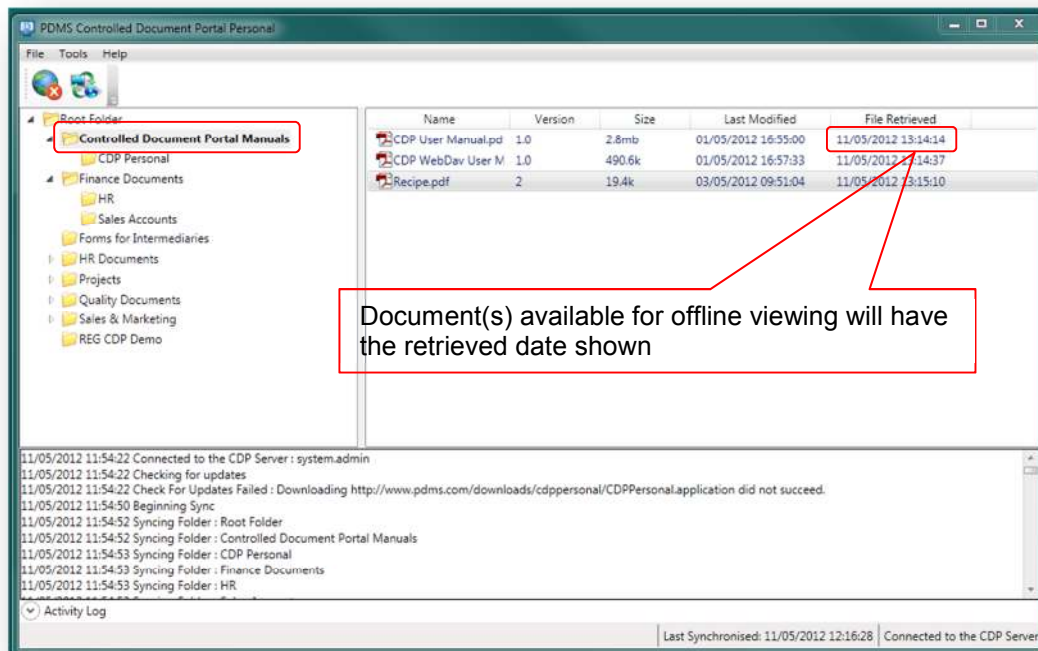


Then, in the Folder Properties dialog, check the “Automatically download folder contents” checkbox.

The contents of the Folder will then be automatically Downloaded to your CDP personal on synchronisation with your CDP web application, both when a manually and when a synchronisation is performed as per a Synchronisation Schedule set up by you (see **CDP Personal Synchronisation Schedule**, above).

### 3.4.2 Downloading and Viewing Documents

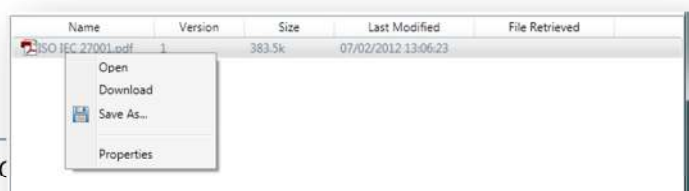
Documents that have been synchronised with your CDP web-application, but have not yet been downloaded, are displayed in the Documents section of the CDP Personal Main Window in grey text; Documents which have been both synchronised and downloaded are displayed in black text. In addition, Documents which have been downloaded will be



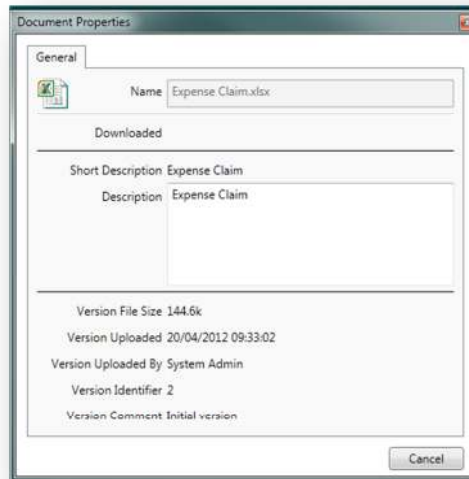
displayed with a "File Retrieved" date.

The behaviour of the functions that can be performed on Documents depends on whether or not CDP Personal is connected to your CDP web application. All are available by right clicking the Document.

- **Open:** Will download and open the selected document in the default application for the file type of the Document. If CDP Personal is Online, then prior to opening the Document, CDP Personal will check your CDP web application and download the Document as necessary.
- **Download:** This option is only available when CDP Personal is Online; it will download the Document to CDP Personal.
- **Save As:** Will open a Save As dialog to allow you to save the Document in your own file system. If CDP Personal is Online, then prior to saving the Document, CDP Personal will check your CDP web application and download the Document as necessary.



- **Properties:** Will open a dialog box detailing the properties of the document, as uploaded to the Document Details section of your CDP web application.

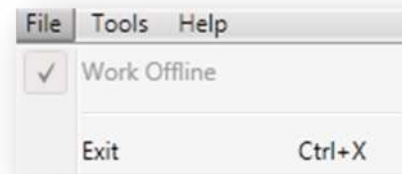


## 3.5 CDP Personal Menus

### 3.5.1 File

The File menu contains two options:

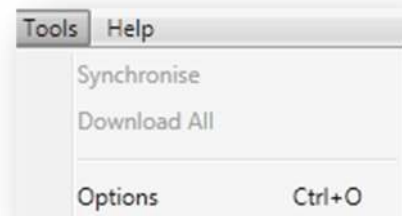
- **Work Offline:** This switch is used to control if the application is Online or Offline (i.e. connected or not connected to your CDP web application). When Offline, you can only see Folders that have been synchronised and access Documents that have been downloaded.
- **Exit:** This option will close CDP Personal.



### 3.5.2 Tools

The tools menu contains three options:

- **Synchronise:** Clicking this option will cause CDP Personal to synchronise to your CDP web application. Synchronisation will transfer the information about the files contained in the folders, but **will not** download the files themselves.
- **Download All:** Clicking this option will download all the Documents that you have permission to access in your CDP web application.
- **Options:** This is where you set your preferences and configure the CDP Personal as described in the “Configuration” section above.





### 3.5.3 Help

The Help menu contains three options:

- **Check For Updates:** Clicking this option will cause CDP Personal to check for updates/upgrades to the software application itself.
- **Show EULA:** Clicking this option will display a window showing the CDP Personal End-User Licence Agreement with PDMS.
- **About CDP Personal:** Clicking this option will display a window showing the CDP Personal application version information and links to the agreements relating to use of the CDP and CDP Personal.

