Navigating

ImageSite

Web-based Document Management System

Getting Started

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Preface
# In This Guide (Overall Purpose)

This guide presents a general introduction and quick instructions to ImageSite. The purpose of the instructions is to help employees inside and outside of the Physical Facilities Plant (PFD) at Miami University.

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**Tip:**
1 About ImageSite®

This chapter introduces eQuorum ImageSite® and describes Basic functions to assist employees inside and outside of the Physical Facilities Department (PFD) at Miami University as well as outside contractors to navigate efficiently and quickly through a Web-based Document Management System called ImageSite.

Chapter Contents
- What is ImageSite®? And the Purpose of ImageSite®
- User Profile
- How can ImageSite “HELP”?
What Is ImageSite®?

ImageSite® is a web-based collaboration solution for storing information. ImageSite administrators define online projects that organize documents into folders. Within these projects, users from Miami University and offsite contractors, architects (provided a password), can find, view, work with, and print drawing and documents on an as needed basis.

Terminology Note: The default term for an ImageSite document repository is *project*. As you begin the navigation process you will notice that the file folders is referenced as “project”.

Reader Profile

The primary audience for Navigating ImageSite includes all of the Physical Facilities Department, outside contractors, Miami University students and faculty members.

While most users may have a general understanding of computer systems and computer access, logins, etc… it is important to provide clear and easy to read instructions that will guide all nonusers of computers.

The main goal of the instructions (user guide) is to assist a user who may have very little experience with computers (or none at all) in navigating through what may be very intimidating process of retrieving drawings and documents efficiently.

How can ImageSite® HELP?

The “Navigating ImageSite” getting started user guide will assist users who may feel unsure and somewhat intimidated with the complexity of a formal search for a drawing, construction documents, specifications of past, present or future building projects.

Therefore, the process of navigating through the Miami University document management system, ImageSite®, becomes a much needed and valuable process for one to understand.

Our goal is to provide a quick version User Guide that will give a user confidence in the ImageSite navigation process on an as needed basis.
This chapter takes you on a tour of the basic features of navigating ImageSite in the Explore mode interface. Explore mode is designed for active projects, where users need to upload and download documents, make changes, and track versions of drawings, specifications and other important documents. This mode allows you to construct and browse a multi-level tree structure of folders and subfolders.

Chapter Contents
► “Project ImageSite work area - Logging In to ImageSite
► Logging In to ImageSite Explore Mode
► Opening a Project
► Expanding and Collapsing the Tree View
► Viewing a document
► Printing a document
“Project ImageSite” Work Area

1. Locate “Project ImageSite” designated workspace in the Facilities Resource Center, Cole Service Building, Room 113. (add a link here for the layout of the FRC Room).

2. Go to the Physical Facilities Site (add the link here) – Click on MyPFD.

3. At MyPFD page click on ImageSite
4. The Login Screen for ImageSite will appear, type **UNIQUE ID** (lower case) and **PASSWORD** (lowercase) and hit **ENTER**.

5. If the default mode set by FRC administrators is Explore mode, ImageSite immediately displays the Projects Home page. If the default mode is Find mode, ImageSite displays the Find Page. Click **Switch to Explore mode** to display the Projects Home page.
Quick Tour - Explore Mode

1. Once you have logged into the Explore Mode, the PROJECTS HOME PAGE will come up. Projects that you will have access to viewing and printing are contained on this page. You will currently have access to (or a combination of) the following projects:

- Athletic Facilities
- Auxiliary Facilities
- Building Floor Plans
- Buildings
- Campus Utility Maps
- Conference/Banquet Facilities and Chapels
- Engineering
- Grounds
- Hamilton Campus
- Luxembourg Campus
- Middletown Campus
- Razed Buildings
- Rental Properties
- Reports
- Residence Halls
- State Buildings

2. Click on the project name you wish to search; for example: if you are searching a building floor plan of a building that has been on the Miami campus for years, please click on the project, “Building Floor Plans” to enter the project.
3. Once you have selected *Building Floor Plans* select the (+) to create a tree of folders, one for each campus.

4. Click on the (+) symbol next to the campus you wish to select. Branch campus folders for each building will appear. Oxford campus folders are grouped by facility type: Athletic, Auxiliary, Rental Properties, Residence and Dining Halls, State Buildings, and Steam and Chiller Plants. *(This will create a tree of folders, one for each building under the designated campus folder).*
Tree of Folders

5. Click on the (+) symbol next to the group type you wish to access (example: State Buildings – this will create a tree of folders, one for each building under the designated campus folder). You will also notice to the right Folder Information – this information will inform you of the date the drawings were entered into the system.
6. Click on the (+) symbol next to the building you wish to access (example: Alumni Hall – this will create a tree of folders, one for each building under the designated campus folder).

7. Click on the floor plan you wish to view, it will come up to the right of the menu. Once the drawing comes up you will notice information regarding the drawing. The drawing name and description line will hold special information pertaining to each drawing.
To View Within A Drawing or Document

1. To enlarge a section of the drawing, mouse over to the right side of the screen, click inside the drawing and expand a box around the area to enlarge. Do this by holding down and releasing the mouse.

2. To navigate within a view, use the arrows at the bottom left and right and right side top and bottom to move around a given view.
3. Click on the space bar to return back to the original “full view”. This may require a couple of clicks.

**To Print a View or Drawing**

1. Go to the top blue bar above the drawing and click on “BASKET”.
2. Click on “OUT BASKET”.

3. You will see a new screen that indicates “Tree View – (unnamed, 1 document). In our example, Alumni first floor 1 is being shown here. Once you select “OUT BASKET” a check mark appears in the box adjacent to Alumni 1.
4. Go to the left bar and click on “PRINT ALL AT SERVER” under heading PUBLISH.

5. You will notice at the top of the screen Print at Server 1 document, select “Submit Job” under job settings.

Note:
See Paul D. and or Rick Costello at 9-xxxx for more printing HELP.
6. Your job will be sent to the printer in the **Facility Resource Center** (Cole Service Building, Room 113). Your job will be located at the **wide format printer 510**. At this screen you will be given a confirmation that your job was submitted and should be printing at this time. If you look for your job and it is not at the printer, please contact one of the **FRC Administrators for assistance**.

7. After printing the selected image, exit by selecting the **"HOME"** button to the left blue bar.
8. You should be back to the “PROJECTS HOME PAGE”. You can now select a new project to navigate.
This chapter takes you through the Find mode of navigating ImageSite. You can use the Find mode to search through all of the documents or folders in every project you have access to in ImageSite.

Chapter Contents
► Logging In to ImageSite Find Mode
► How to Construct a Find Query
► Working with Your Find Results
► Viewing a document
► Printing a document