

Maintaining Orphaned Documents

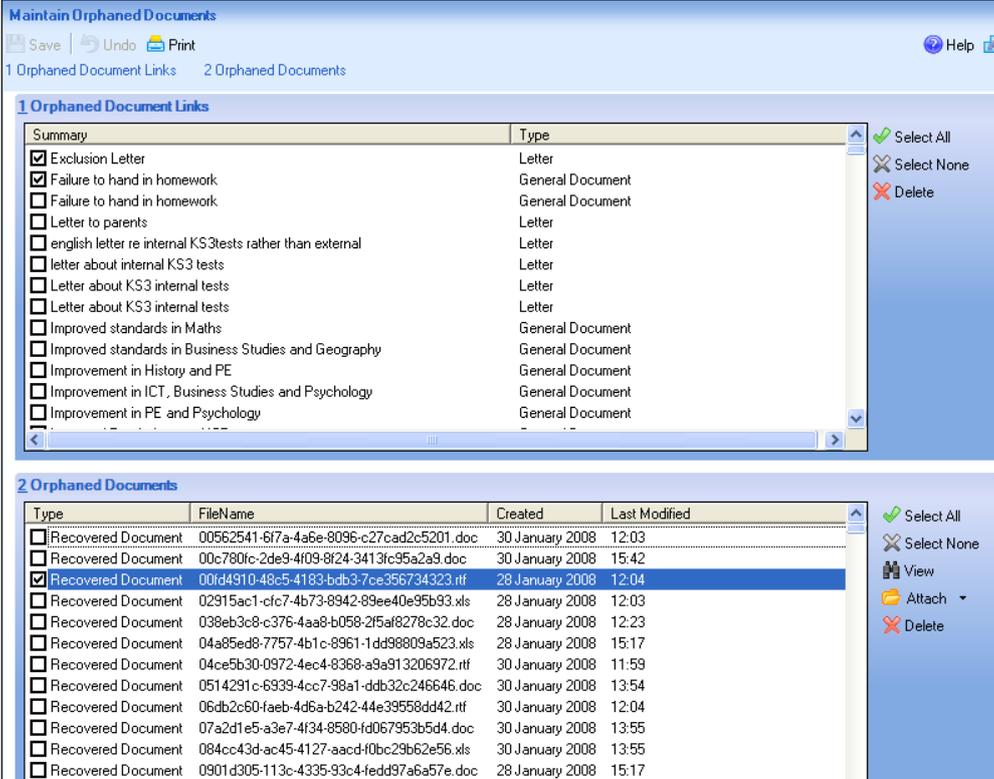
NOTE: This functionality is available to School Administrator permissions only.

The Document Management Server has the capacity to contain a large number of diverse documents, from individual profiles and assessment reports, through to general letters to parents. It is also possible that documents may become detached from their link to a person or organisation, making it impossible to trace documents back to their original source. This may occur because:

- The DMS was down when the document was selected for deletion such that only the link to the document was removed.
- Profiles and individual assessment reports have been superseded by a later version, but earlier versions still remain.

Such documents are referred to as orphaned documents. It is now possible to restore, recover (where possible) or delete orphaned documents.

1. Select **Tools | Housekeeping | Document Management Server | Maintain Orphaned Documents** to display the **Maintain Orphaned Documents** page.



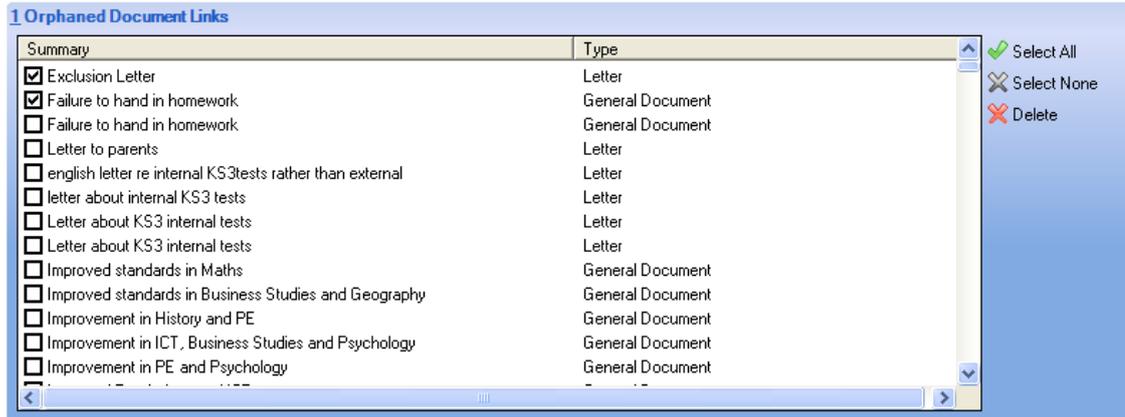
1 Orphaned Document Links

Summary	Type
<input checked="" type="checkbox"/> Exclusion Letter	Letter
<input checked="" type="checkbox"/> Failure to hand in homework	General Document
<input type="checkbox"/> Failure to hand in homework	General Document
<input type="checkbox"/> Letter to parents	Letter
<input type="checkbox"/> english letter re internal KS3 tests rather than external	Letter
<input type="checkbox"/> letter about internal KS3 tests	Letter
<input type="checkbox"/> Letter about KS3 internal tests	Letter
<input type="checkbox"/> Letter about KS3 internal tests	Letter
<input type="checkbox"/> Improved standards in Maths	General Document
<input type="checkbox"/> Improved standards in Business Studies and Geography	General Document
<input type="checkbox"/> Improvement in History and PE	General Document
<input type="checkbox"/> Improvement in ICT, Business Studies and Psychology	General Document
<input type="checkbox"/> Improvement in PE and Psychology	General Document

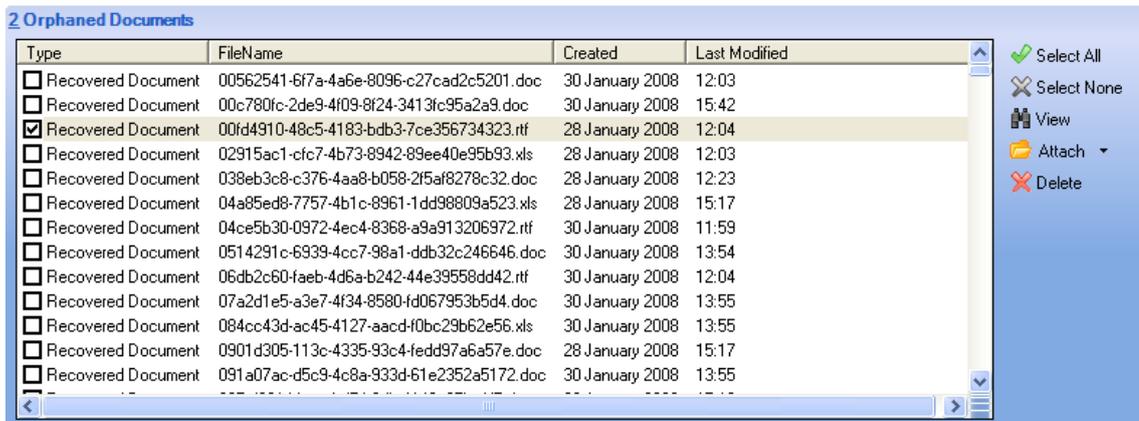
2 Orphaned Documents

Type	FileName	Created	Last Modified
<input type="checkbox"/> Recovered Document	00562541-6f7a-4a6e-8096-c27cad2c5201.doc	30 January 2008	12:03
<input type="checkbox"/> Recovered Document	00c780fc-2de9-4f09-8f24-3413fc95a2a9.doc	30 January 2008	15:42
<input checked="" type="checkbox"/> Recovered Document	00fd4910-48c5-4183-bdb3-7ce356734323.tif	28 January 2008	12:04
<input type="checkbox"/> Recovered Document	02915ac1-cfc7-4b73-8942-89ee40e95b93.xls	28 January 2008	12:03
<input type="checkbox"/> Recovered Document	039eb3c8-c376-4aa8-b058-2f5af8278c32.doc	28 January 2008	12:23
<input type="checkbox"/> Recovered Document	04a85ed8-7757-4b1c-8961-1dd98809a523.xls	28 January 2008	15:17
<input type="checkbox"/> Recovered Document	04ce5b30-0972-4ec4-8368-a9a913206972.tif	30 January 2008	11:59
<input type="checkbox"/> Recovered Document	0514291c-6939-4cc7-98a1-ddb32c246646.doc	30 January 2008	13:54
<input type="checkbox"/> Recovered Document	06db2c60-faeb-4d6a-b242-44e39558dd42.tif	30 January 2008	12:04
<input type="checkbox"/> Recovered Document	07a2d1e5-a3e7-4f34-8580-fd067953b5d4.doc	30 January 2008	13:55
<input type="checkbox"/> Recovered Document	084cc43d-ac45-4127-aacd-f0bc29b62e56.xls	30 January 2008	13:55
<input type="checkbox"/> Recovered Document	0901d305-113c-4335-93c4-fed97a6a57e.doc	28 January 2008	15:17

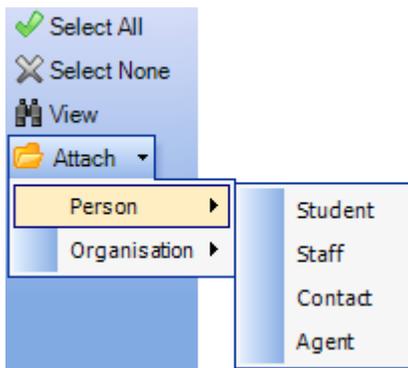
The **Orphaned Document Links** panel displays a list of any links that no longer have documents attached to them.



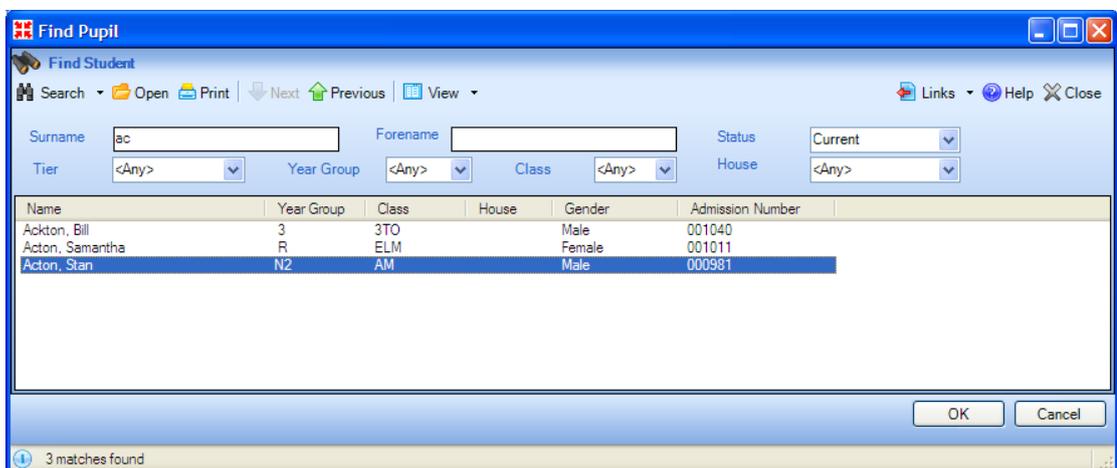
- Because the documents are no longer stored on the DMS, the links cannot be restored and therefore need to be removed. This is achieved by clicking the **Select All** button, then clicking the **Delete** button. Alternatively, individual links can be removed by selecting the adjacent check box, then clicking the **Delete** button.
- The **Orphaned Documents** panel displays any orphaned documents that are no longer linked to their original source. These documents are still stored on the DMS and as such, can often be re-attached to their original source if sufficient information is available.



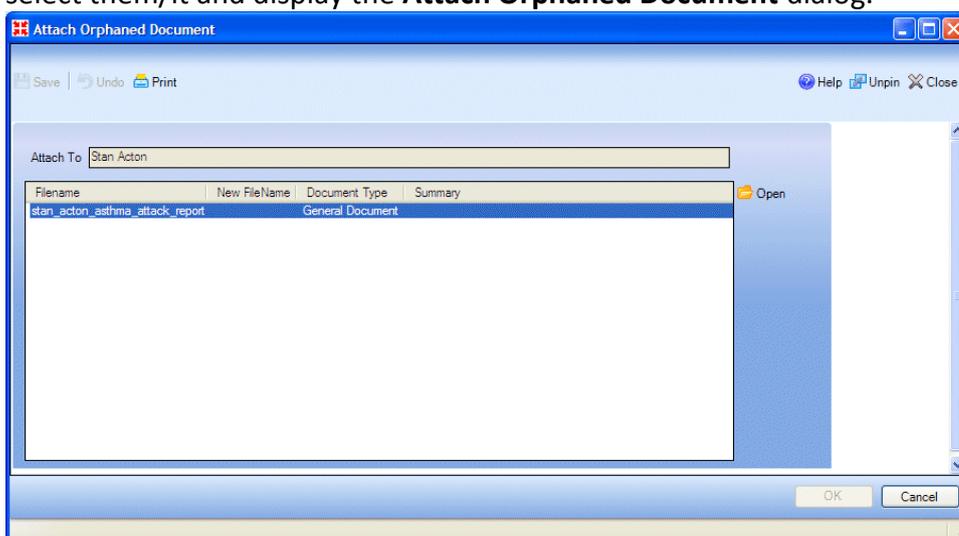
- Select the check box adjacent to an individual orphaned document and click the **View** button to display the document contents. From the information contained in the document, it may be possible to determine the record the document was originally attached to.
- If sufficient information has been found to enable the document to be re-attached to its original source, click the **Attach** button and select the appropriate option from the drop-down list, e.g. **Person | Student**.



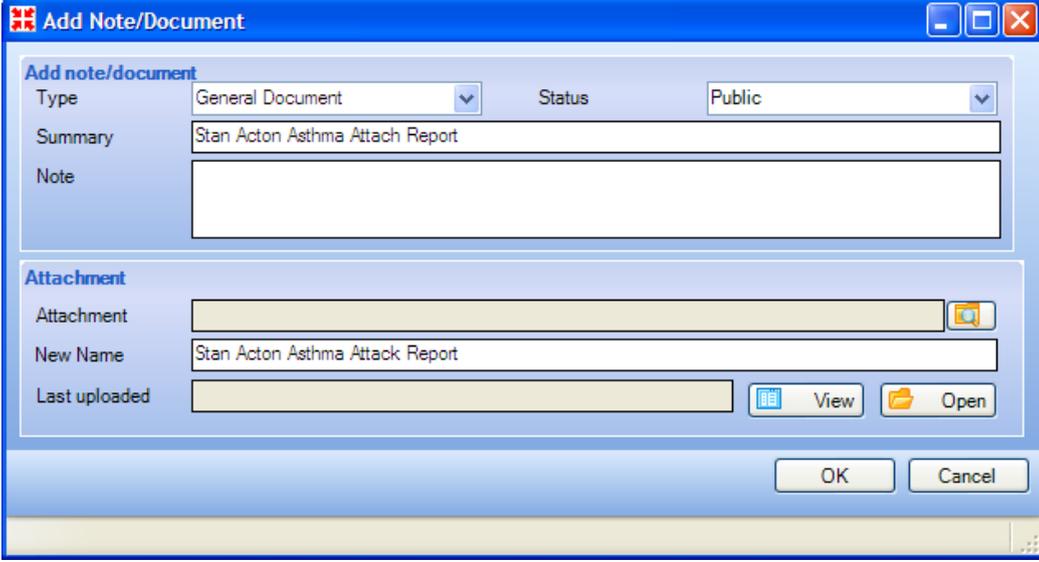
- The applicable browser is displayed enabling you to select the required person or organisation. For example, selecting **Person | Student** displays the **Find Pupil** (or **Student**) browser.



- Search for and select the required person or organisation then click the **OK** button to select them/it and display the **Attach Orphaned Document** dialog.



- Highlight the filename of the orphaned document then click the **Open** button to display the **Add Note/Document** dialog.



9. Ensure that the **Type** is selected from the drop-down list and that a clear and concise **Summary** is entered.
10. Select the **Status** of the document from the drop-down list as per the following options:
 - **Public** – the document is available to all users with sufficient add/view/edit document permissions.
 - **Private** – the document is available only to you.
 - **Confidential** – the document is available to SIMS users with School Administrator or Senior Management Team permissions.
11. Enter a **Note** that clearly describes the contents of the document. This may help in future if the document subsequently becomes orphaned.
12. Enter a New Name for the document and click the **OK** button to return to the **Attach Orphaned Document** dialog.
13. Click the **Save** button on the **Attach Orphaned Document** dialog to re-attach the document.
14. Click the **OK** button to return to the **Maintain Orphaned Documents** page and repeat for any remaining orphaned documents.
15. Click the **Save** button on toolbar to complete the process.