



# ONLINE DIRECTIVES INFORMATION SYSTEM (ODIS)

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## Publisher User Manual

June 21, 2022  
Version 2.5



Department of Human Service  
Office of General Counsel

## REVISION HISTORY

| Date          | Version | Description  | Author |
|---------------|---------|--|--------|
| March 2014    | 1,0     | Genesis  | OIT    |
| February 2019 | 2.0     | <ul style="list-style-type: none"> <li>▪ Technology Update (Database and Controllers)</li> <li>▪ New Functionality               <ul style="list-style-type: none"> <li>○ New URL</li> <li>○ Document Revisions</li> <li>○ Manage Folders (Publishers)</li> </ul> </li> </ul>  | OIT    |
| March 2019    | 2.1     | Updated Section 4.3.4 – Creating Document Hyperlinks (Corrected how to copy address for hyperlink to ODIS document)  | OIT    |
| April 2019    | 2.2     | <p>Updated Section 4.1</p> <ul style="list-style-type: none"> <li>▪ Added Revised Menu with Help added</li> </ul> <p>Add Section 4.1.6</p> <p>Updated Section 4.4.2</p> <ul style="list-style-type: none"> <li>▪ Added revised Document Upload form for Document Revisions. Folder selection added. And is a required field for document uploads.</li> </ul> | OIT    |
| October 2019  | 2.3     | <ul style="list-style-type: none"> <li>▪ Updated Figure 3</li> <li>▪ Added Sections 4.1.6 and 4.4.3</li> </ul>   | OIT    |
| January 2020  | 2.4     | <ul style="list-style-type: none"> <li>▪ Added 4.3.5 Delete a Document</li> <li>▪ Added 4.3.6 Rejected Documents</li> </ul>  |        |
| June 21, 2022 |         | <ul style="list-style-type: none"> <li>▪ Updated Title Page</li> <li>▪ Updated Language</li> </ul>   | OIT    |

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## 1.0 Introduction

The DHS Online Directives Information System (ODIS) provides a centralized repository for publishing DHS Policy and Manual Directives. The Office of General Counsel (OGC) is charged with managing the ODIS system. The ODIS Administrator/Manager (OAM) oversees the entire system. The ODIS Administrator/Manager (OAM) is responsible for the day-to-day monitoring of ODIS. The OA also provides technical support to ODIS Publishers across DHS Divisions and Offices.

### 1.1 Purpose:

---

This document is a user manual for the ODIS Application Publisher role. The user manual provides an operational overview of the features and functionalities of ODIS and serves as central point of reference for the intended use for ODIS Publishers. The manual includes a description of the system functions and capabilities, step-by-step procedures for system access and use, and incorporates detailed illustrations where possible.

### 1.2 Scope:

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This manual describes the **June 2022** release of the ODIS Application and any additional changes or corrections as summarized in the [Revision History](#) section of this document.

## 2.0 Describing the System

### 2.1 Environment

---

ODIS is a web-based application that is accessible to users internal and external to DHS. The ODIS public web site is accessible to anyone with access to the internet and does not require any user credentials. The ODIS portal for Publishers and Administrators/Managers resides within the DHS firewall and requires the user to log in with applicable user credentials.

### 2.2 System Requirements

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Access to ODIS requires a web browser with a minimum of:

- Microsoft Edge
- Mozilla Firefox browsers: Mozilla Firefox 29 and above.
- Google Chrome browsers: Google Chrome 34 and above

### 2.3 User Roles

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There are three user roles for ODIS, and they are as follows:

- **Administrator/Manager:** DHS Employee. The Administrator/manager manages Oversees the entire ODIS system. He/she has access to ODIS and approves documents that are published to ODIS public website. The Office of General Counsel (OGC) governs the administration of ODIS.
- **Publisher:** DHS Employee. The Publisher submits new documents and manages existing documents that are published on the ODIS public website for his/her DHS Division or Office.
- **Public:** Public is anyone with an interest in DHS Manuals and Directives and have access to the ODIS web site from a supported web browser. The Public user does not require a password or any type of authentication. The Public user have access to any Manual or Policy that is published to the public website.

### 2.4 System Access

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#### 2.4.1 External Site (Public)

The ODIS public website provides public access to DHS Policy and Manual Directives. The website address is: <http://odis.dhs.ga.gov>. As a Publisher when you submit a document to the ODIS Administrator/Manager the document is approved to be publish to the ODIS public website and is

accessible to the public and consumers internal and external to DHS. The ODIS public website allows users to search and download documents. Users may also subscribe to receive an email notification of any updates to documents published on ODIS by any DHS Division, Office or Program.

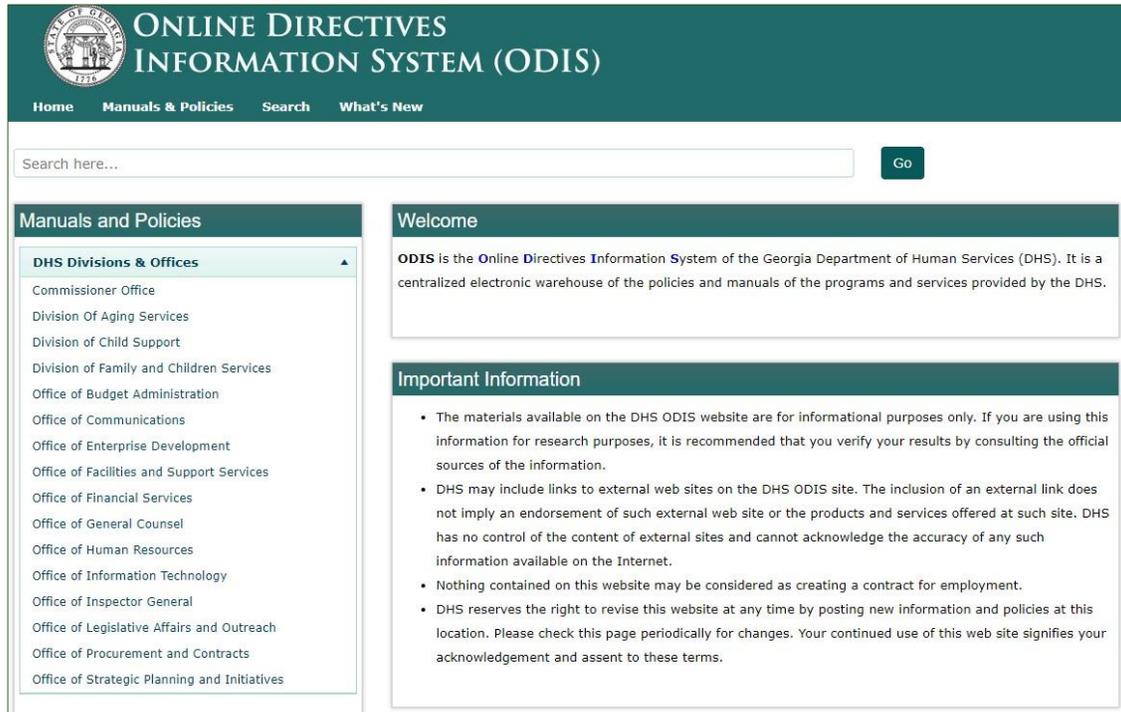


Figure 1: ODIS Public Site

### 2.4.2 Internal Site (Administrators & Publishers)

There are two views for the ODIS Internal application, an Administrator/Manager, and a Publisher view. The Administrative view is only accessible by the ODIS System Administrator/Manager (OAM). The Publisher view is accessible to designated staff in each DHS Division or Office who is responsible for managing directives and manuals that are published on the ODIS public website.

To ensure a secure work environment, the ODIS Administrator/Manager and Publisher Portal is only accessible within the DHS firewall at <http://odisinternal.dhs.ga.gov/>. This means, Publishers must be connected to the DHS network either from a DHS office or via DHS Virtual Private

Network (VPN). The login page for the ODIS internal site is displayed in **Figure 2: ODIS Administrator/Manager and Publisher Portal**.

ONLINE DIRECTIVES  
INFORMATION SYSTEM (ODIS)

WELCOME TO ONLINE DIRECTIVES INFORMATION SYSTEM (ODIS)

Please login to Access your Account

Username \*

Password \*

Sign In

[Need help?](#)

Copyright ©2018 All Rights Reserved - Department of Human Services  
This site can be best viewed in IE 11.0 or above with 1366 X 768 screen resolution

Figure 2: ODIS Administrator/Manager and Publisher Portal

The State of Georgia (SOG) credentials is used to assess the ODIS Administrator/Manager and Publisher portal. The SOG credentials are the username and password that is used to access the DHS network.

### 3.0 Quick Reference

#### 3.1 Acronyms

| Acronym | Definition                          |
|---------|-------------------------------------|
| DHS     | Department of Human Services        |
| MAN     | Manual                              |
| OAM     | ODIS Administrator/Manager          |
| ODIS    | Online Directive Information System |
| OGC     | Office of General Counsel           |
| SOG     | State of Georgia                    |
| TOC     | Table of Contents                   |

#### 3.2 Icons and Controls

| Icons / Controls  | Description  |
|---|--|
|   | <b>Edit:</b> Enables editing of an associated record.  |
|  | <b>Expand:</b> Expands a collapsed list item   |
|  | <b>Collapse:</b> Collapses an expanded list item   |
|  | <b>Refresh:</b> Reloads the current page. Any new changes to page displays.  |
|  | <b>Delete:</b> Deletes or removes the current entry or associated record   |
|  | <b>Comments:</b> Displays any comments added to a document. Comments are internal to DHS, only Publishers and Administrators can view comments   |
|  | <p><b>Filter/ Sort:</b> Enables the sorting of columns in ascending or descending order. Allows data to be filtered by selected column for specific record or records by entering search criteria such as “Is Equal to” or “Contains”.</p>  |

## 4.0 Instructions

Section 4.0 provides the Publishers with instructions for uploading and publishing new documents, revising existing documents and how to manage the Publisher work area.

### 4.1 Publisher View

The ODIS Publisher menu provides the options: **Manage Documents | Manage Folders | Help** and **Logout**. (Reference **Figure 3: Publisher View Landing Page: Flag**)

| Document ID | Name                                   | Publisher  | Program       | Folder                     | Modified Date | Expiration Date |
|-------------|--|------------|---------------|----------------------------|---------------|-----------------|
| 4004128     | <u>Aging Services Demo Document</u>    | Jane Doe   | Elder Care    | Chapter 01: Elder Guidelin | 4/27/2018     | 5/10/2018       |
| 4003997     | <u>TANF Requirements Demo</u>          | Bob Smith  | TANF          | Regional Intak Forms       | 5/1/2018      |                 |
| 4003982     | <u>Early Childhood Learning Demo</u>   | Mary Smith | Child Welfare | Chapter 12: ELC            | 5/1/2018      |                 |
| 4003981     | <u>Child Placement Guidelines Demo</u> | Mary Smith | Child Welfare | Chapter 13: Placement      | 8/25/2017     |                 |

Figure 3: Publisher View Landing Page

#### 4.1.1 Manage Documents

The Manage Documents functionality provides the Publisher with two work tabs **Work Area Documents** and **Published Documents**. The Work Area Documents are documents that are only viewable to the Publisher or the ODIS Administrator/Manager contingent upon the document status, which will be discussed later in this document. The Published Documents are documents that has been submitted and approved by the ODIS Administrator/Manager for publishing and are available on the ODIS public website. (Reference **Figure 3: Publisher View Landing Page: Flags** and )

### 4.1.2 Manage Folders

The **Manage Folders** functionality provides the Publisher the ability to organize his/her documents in personalize folders. The folders created in Manage Folders are only accessible by the Publisher who created the folder. (See Section 4.2 for complete details on the Manage Folders functionality)

### 4.1.3 Index Drop Down

**Index** displays the DHS Division or Office and the Program in which the Publisher is assigned. (Reference **Figure 3: Publisher View Landing Page: Flag**). If the Publisher is assigned to multiple Programs within in a Division of Office, the Programs will be listed under applicable Division or Office. For example, in **Figure 4: Index Expanded**, the Publisher is assigned to Office of Financial Services (OFS) and within OFS the Publisher publishes documents for multiple Programs. Using the Index functionality, the Publisher can quickly filter which documents are displayed in the **Work Area Documents** and **Published Documents** grid.



Figure 4: Index Expanded

### 4.1.4 Publisher Drop Down

The **Publisher** drop-down list displays the Publisher of the documents that are displayed in the **Work Area Documents** and **Published Documents** grid. (Reference **Figure 3: Publisher View Landing Page: Flag**). The Publisher is defaulted to the Publisher who is logged in. If a Program have multiple Publishers, the Publisher drop-down list will contain **ALL**. Selecting **ALL** from the Publisher drop-down lists will display documents of the other Publishers that is assigned to your Program(s). The Publisher name will display in the Work Are grid. To see Work Area documents of a specific Publisher, use the filtering feature (described in Section 4.1.5) on the Publisher column.

### 4.1.5 Display: Sort, Filter, Display Columns in Grids

The columns in ODIS grids can be sorted, filtered and columns can be hidden. To sort, filter or change the columns displayed in an ODIS grid click the eclipse (3 dots) located to the right of each column label.



Figure 5: Sort or Filter, Display Columns

A menu will display which provides the options to sort the selected column in ascending or descending order. Click the caret next to Columns to see a list of the columns heading for the grid. **See Figure 7: Select Columns to Display**, below.

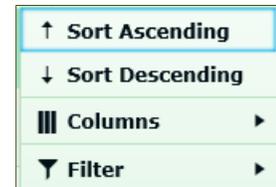


Figure 6: Sort, Filter and Column Menu

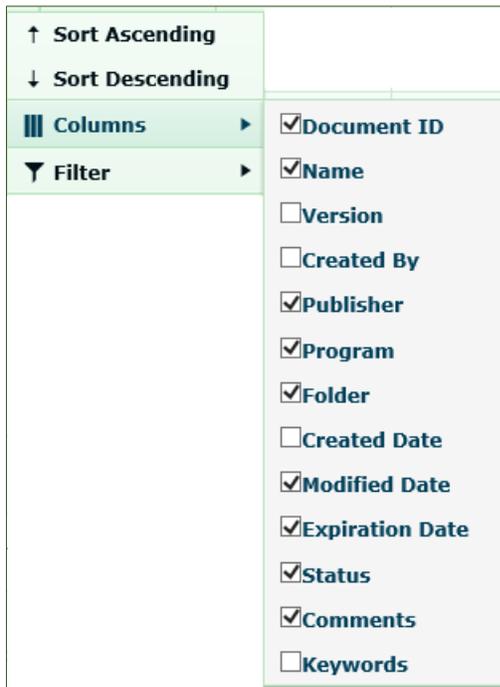


Figure 7: Select Columns to Display

Check the check box next to the column name to display the column. Uncheck the check box next to the column name to hide the column.

To Filter a column, select Filter. The filtering options vary by the column contents. For most columns you can filter by keyword, or search for items starting with specific characters.



*Remember to clear your filters when you are finish working with the filter results and want to return to the default grid.*

All changes to a grid, that is sorts, filters or selection of columns are only maintain for the current session. Once you end a session by logging out of ODIS, the next time you log into ODIS the grid will have its default setting.

#### 4.1.6 Help

To view the latest version of the ODIS Publisher’s User Guide, from the Publishers Menu click the **Help** hyperlink. (Reference **Figure 3, Flag**) The user guide may be viewed online or downloaded and saved to your PC or laptop.

## 4.2 Managing Folders

The Manage Folders feature allows the Publisher to create and manage folders as well as the content that is organize in the folder. Folders are exclusive to the Publisher and are only accessible to the Publisher who created the folder. All documents uploaded to ODIS (new and revised) must be placed in a Folder.

#### 4.2.1 Create a New Folder

To create a new folder, click **Manage Folders** from the Publishers menu and then click **Add New Folder** as show in **Figure 8**.

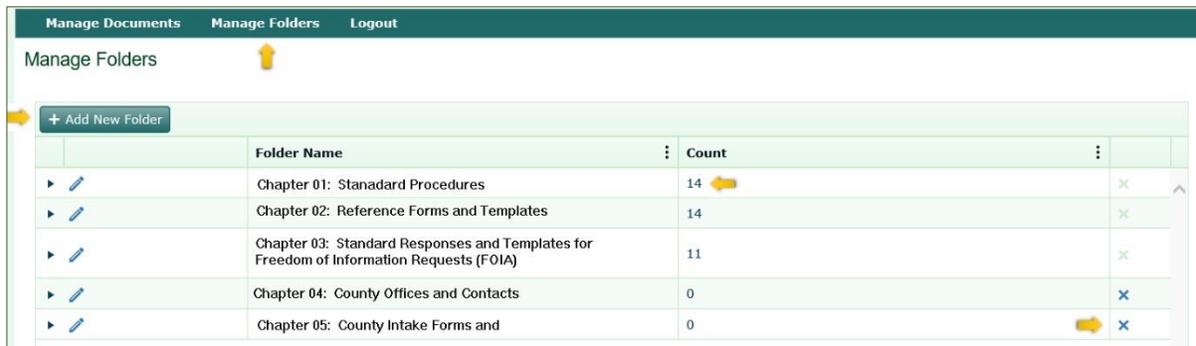


Figure 8: Add New Folder

The system will display a data input row. Input the desired name for the folder and click **Save** to create the folder.



Figure 9: Add New Folder - Folder Name

The **Count** column to the right of the Folder Name is the number of documents in the folder. Folder. A newly created folder, the document count will equal zero. As document are added to the folder the document count will increment accordingly.



*When uploading a new document to ODIS, Folder is a required field. If the Folder does not already exist, create the Folder 1st and then upload the new document to ODIS.*

#### 4.2.2 Edit a Folder

To edit a folder, click the edit  icon next to the folder to be edited. Make desired changes to the folder name and click the **Save** button.

#### 4.2.3 Move a Document to a Different Folder

To move a document to a new folder. Click the expand caret  next to the folder that contains the document(s) that is to be moved to a new folder. The folder expands to display the folder contents.

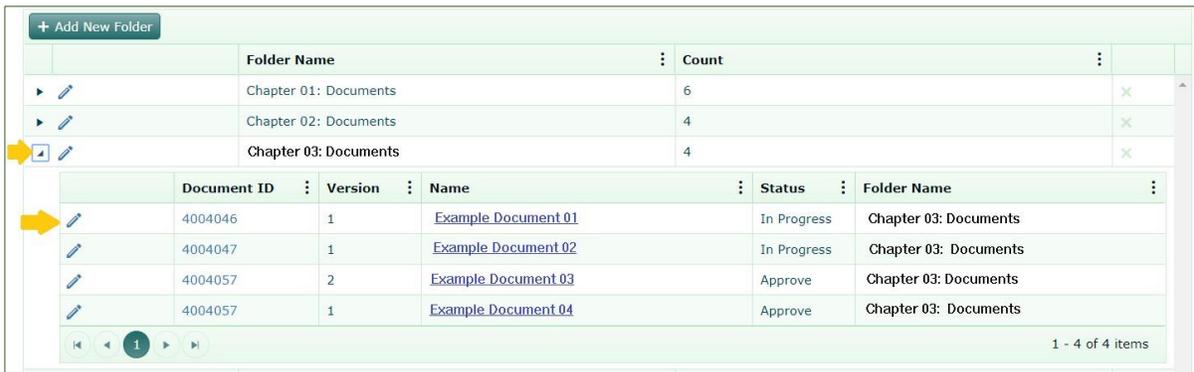


Figure 10: View Folder Contents

Next, click the edit icon next to the document that is to be moved to a different folder. (See **Figure 10: View Folder Contents**.) The document name and folder can be modified, see **Figure 11: Change Document Folder**.

Expand the **Folder** drop-down list. Select desired Folder. Click **Update**.

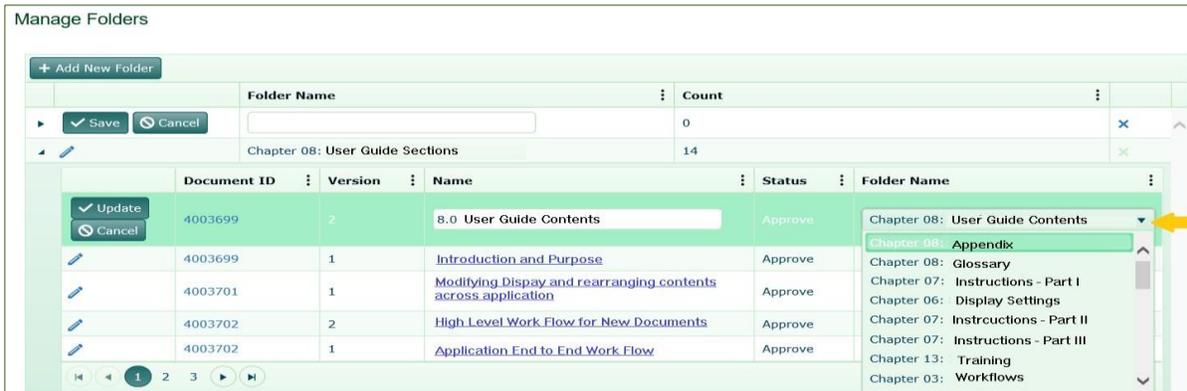


Figure 11: Change Document Folder

#### 4.2.4 Delete a Folder

Only folders that are empty can be deleted. Therefore the delete icon will only be active for folders where the document count is equal to zero.

In the Manage Folders grid, each Folder has a count, the count is the number of documents in the associated folder. Again, only the folders with zero (0) documents can be deleted. Click the **Delete** icon **X** to delete a folder. ODIS will prompt you: **Are you sure you want to delete this record?** Click **OK** to permanently remove the folder from ODIS.



Figure 12: Delete a Folder

### 4.3 Add New Document

#### 4.3.1 Work Area Documents

To add a new document to ODIS, from the ODIS menu click **Manage Documents**. At log in, Manage Document is the default view. The **Work Area Documents** tab contains all documents that are in process or submitted to the ODIS Administrator/Manager for review. These documents are **NOT** published on the ODIS public web site. The grid is scrollable horizontally and the content for each column is defined in *Table 1: Work Area Document Column Descriptions*.

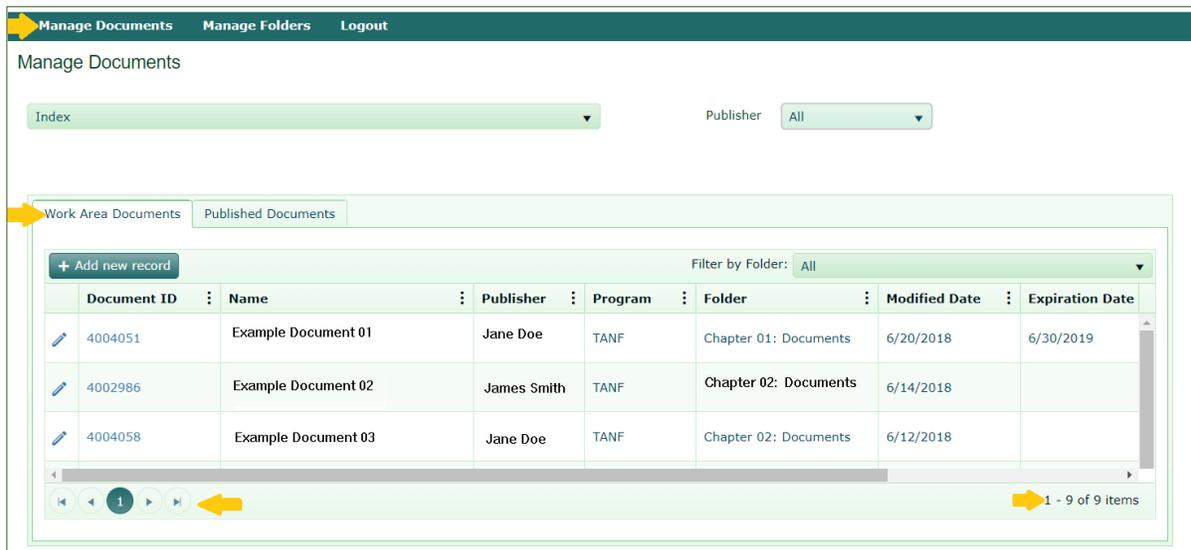


Figure 13: Work Area Documents Grid

The grid displays 10 rows per page and pagination is provided in the lower left corner of the grid, which enable quick and easy navigation between pages. In the lower right corner, a document count is provided.

The **Work Area Documents** column descriptions are as follows:

Table 1: Work Area Document Column Descriptions

| Column Label  | Description   |
|---|---|
|  | Edit Icon – Click to edit document                        |
| Document ID   | Document ID assigned by ODIS when a document is uploaded. |

---

| Column Label  | Description   |
|---|---|
| Name  | Document Name created by the Publisher and should be descriptive of the document contents and should be no l                            |
| Publisher   | DHS staff member responsible for managing the directives published to ODIS for a DHS Division or Office                                 |
| Program   | The DHS Division of Office Program  |
| Folder  | A storage space to group documents. ODIS folders are only accessible to the user who created the folder. ODIS Folder are not shareable. |
| Status  | In Progress; In Review; Rejected; or Pending (Document status is defined below)   |
| Comments  | Comments entered and is only visible to the ODIS Publisher or Administrator.  |
|  | Delete icon. Click to delete a document   |

---

### 4.3.2 Add a New Document

MS Word, Excel and PDF documents can be uploaded to ODIS. The preferred document type, however, is a PDF.

To add a new document to the Publisher Work Area, click the button:



(See Figure 13: Work Area Documents Grid). The Manage Document form is displayed as shown in Figure 14. The required fields are **Program** | **Document Name** | **Document Type** | **Document Status** and

Figure 14: Add New Document Form

**Folder** all which are displayed with the required field indicator: \* . Comments and keywords are optional. Comments are internal and is only viewable to the ODIS Publisher and Administrator. For example, a Publisher may add a comment to communicate to the ODIS Administrator/Manager specific details regarding the document sent for approval. Keywords are informative words pertaining to the content of the document that will assist in retrieving the document in a search.

The Manage Documents form data fields descriptions are provided in Table 2, below.

Table 2: Manage Document (new document) Form field descriptions

| Column Label | Description – Manage Documents Upload Form  |
|--------------|---|
| Program      | Select the applicable DHS Program. Some Publishers have multiple Programs in which they manage ODIS document. |

| Column Label    | Description – Manage Documents Upload Form  |
|-----------------|---|
| Document Name   | The document name is created by the Publisher. The document name should be descriptive of the document contents, <b>should be less than 48 characters and no special characters except for an underscore, “ _ ”</b> .   |
| Type            | The ODIS Document Type consists of: <b>Policy   Manual (T.O.C)   and Other (Chapters)</b>   |
| Status          | <p><b>In Progress</b> – Select when a document is still in the review process at the Division or Office level</p> <p><b>Review</b> – Select once a document has received the appropriate approval at the Division or Office level and is ready for review by OSPI. Once a document is placed in review status an email notification will be sent to the ODIS Administrator/Manager that a document is ready for review.</p> |
| Comments        | Enter any additional details pertaining to the document for the ODIS Administrator/Manager.   |
| Keywords        | Keywords will be used in the search function to locate documents associated with the keyword. Keywords should be relevant to the document contents.   |
| Folder          | Select a folder where the documents are to be kept for Publisher reference. The Folder should already exist.  |
| Expiration Date | Expiration Date is optional. It is the date the document contents are no longer relevant and should not be accessible by the public.  |
| File            | Allows the Publisher to browse to the location of the file that needs to be uploaded.   |
| Save   Cancel   | <p><b>Save</b> commits all changes to the ODIS database.</p> <p><b>Cancel</b> aborts and changes, closes the Manage Documents form, and the Work Area Documents grid is displayed.</p>  |



*Do not put a document in Review status until the document is ready to be reviewed by the ODIS Administrator/Manager for approval to publish to the ODIS public website.*

### **RECAP** – Uploading a new document

1. Log into ODIS Publisher Portal
2. Go to Manage Documents
3. Click Work Area Documents (default landing)
4. Click Add New Records button
5. Complete all required fields on Manage Documents form.
6. Click Select Files to browse and select file to be uploaded
7. Click Save.

### 4.3.3 ODIS Document Statuses

The Publisher can place a document in one of two statuses: **In Progress** or **Review**. However, there are other statuses that may be applied to a document by the ODIS Administrator/Manager. The other status includes **Approved**, **Rejected** and **Pending**. All the ODIS Document statuses are defined in Table 3: ODIS Document Statuses.

Table 3: ODIS Document Statuses

| Status             | Status Description  | Can Publisher Edit Document? |
|--------------------|---|------------------------------|
| <b>In Progress</b> | The document is still in the review process at the Division or Program Office level.  | YES                          |
| <b>Review</b>      | The document has been submitted to the ODIS Administrator/Manager for review and/or approval to publish to the ODIS public website.                         | NO                           |
| <b>Approved</b>    | The document has been reviewed by the ODIS Administrator/Manager and has received the required administrative approval to be published to the ODIS website. | NO                           |
| <b>Rejected</b>    | The ODIS Administrator/Manager has returned the document to the Publisher for edits or corrections.   | YES                          |
| <b>Pending</b>     | The ODIS Administrator/Manager has placed the document on hold for review later. Or a document that has been postponed.                                     | NO                           |

### 4.3.4 Creating Document Hyperlinks

When a document is uploaded to ODIS a unique identifier is created for each document. The unique identifier is called the **Document ID**. ODIS Manuals and/ or Table of Contents contains hyperlinks to the “Other” documents that are referenced in the Manual. For example, **Figure 15** is an excerpt from the Office of Information Technology (OIT) Manual 1900 - Information Security Policies. All the text in blue are hyperlinks to documents that are published on ODIS. To view the Document ID of a document, hover the mouse over the hyperlink to display the target document address and document id.

SUBJECT: Information Security Policies, Procedures and Guidelines

**TABLE OF CONTENTS**

**Information Security Program & Administrative Controls**

DHS Information Security Glossary

| Section #   | Titles   |   |
|-------------|--|---|
| Section 100 | <u>Information Security Policy</u>               | <p>→ All text in blue are hyperlinks to other documents that are published on ODIS.</p>   |
| Section 200 | <u>Access Control Policy</u>                     |   |
|             | <b>Procedures and Guidelines</b>                 | <p>→ Document ID of a hyperlink can be viewed by hovering over the hyperlink with your mouse.</p> <p>In the example below the document Id for Section 203 Criteria for Access to Information Assets = 3007741</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;"> <a href="http://odis.dhs.state.ga.us/ViewDocument.aspx?docId=3007741&amp;verId=1">http://odis.dhs.state.ga.us/ViewDocument.aspx?docId=3007741&amp;verId=1</a> </div> |
| 201         | <u>Access Control Procedures</u>                 |   |
| 202         | <u>Information Asset Ownership</u>               |   |
| 203         | <u>Criteria for Access to Information Assets</u> |   |
| 204         | <u>User Identification</u>                       |   |
| 205         | <u>Generic User IDs</u>                          |   |
| 206         | <u>Administrator User IDs</u>                    |   |

Figure 15: OIT Manual 1900 - Hyperlink Example

To create the Manual or Table of Contents (TOC) that contains ODIS hyperlinked documents. The Manual/TOC document should be open from the Publisher local workstation (PC or Laptop). Preferably the Manual/ TOC will be created in MS Word or if the Publisher have the Professional version of Adobe Acrobat and is able to create hyperlinks, Adobe can be used. Once the layout of the Manual/TOC is complete, the hyperlinks to the applicable ODIS documents can be created.

**STEP 1:** Create the document that will contain the hyperlinks to existing ODIS documents. The documents to be linked must be in ODIS.

**Manual / TOC Example**

| Chapter | Description               |
|---------|---------------------------|
| 001     | Demo Other Document 2018  |
| 002     | Demo Policy Document 2018 |

**STEP 2:** Go to ODIS, Publisher portal. Manage Document and from either your **Work Area Documents** grid or **Published Documents** grid, click (left click) on the Document Id of the document in which you are linking to your TOC, Cover Letter or Manual.

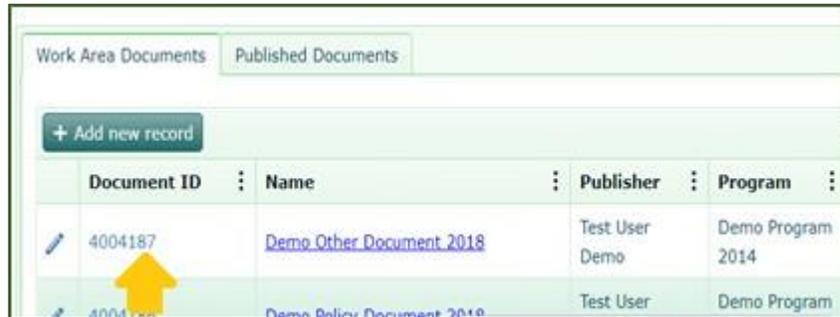


Figure 16 a - Creating Hyperlinks Select Document ID

A pop-up will appear as shown in Figure 17 b and 18 C. **Figure 17 b** is for Chrome and **Figure 18 c** is Internet Explorer.

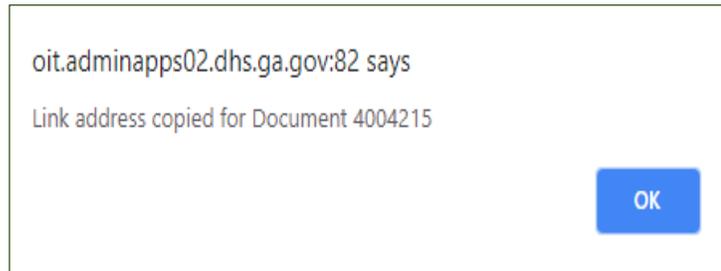


Figure 17 b - Creating Hyperlinks Chrome Pop Up

Click **OK** to copy address of the ODIS document.



*If the web browser displays a message "Do you want to allow Pop-Up" or something similar – Click **Yes** or **Allow** to enable Pop-Ups for ODIS internal site.*

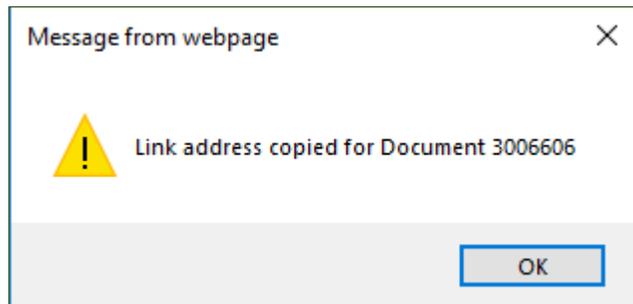
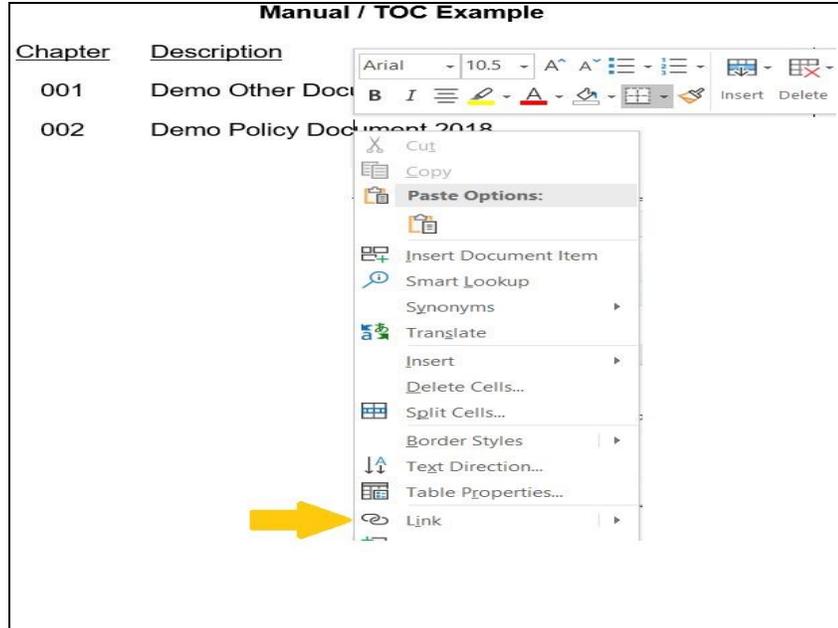


Figure 18 c - Creating Hyperlinks Internet Explorer Pop Up

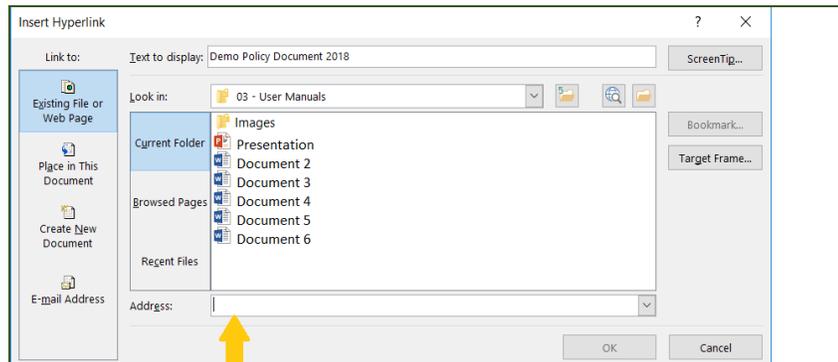
**STEP 3:** Return to the MS Word of Adobe document, where the hyperlink should be linked (e.g., the Manual or Table of Contents) and right click on the Text that is to be linked to the ODIS Document. Select **Link** from the drop-down menu (as shown in snapshot).

An **Insert Hyperlink** dialogue box displays as shown in Step 4.



*If there is an existing hyperlink, the drop-down will have **Edit Link**.*

**STEP 4:** Paste the ODIS document address (the address captured from ODIS in Step 2) in the **Address** field and click OK



Repeat Steps 1 through 4 until all hyperlinks are stored in your Manual or Table of Contents. Upload the Manual or Table of Contents to ODIS follow applicable steps to upload the document to ODIS as either a new document or a revise document,

### 4.3.5 Deleting a Document

An ODIS Publisher may only delete a document with a document status of **In Progress**. Documents with a status of In Progress are displayed in the Publisher Work Area. In Progress

documents are only visible to the person who uploaded the document or in the case of an existing document, the Publisher who change the document status to **In Progress**.

To delete a document, click the delete icon **X** for document to be deleted. If the delete icon is not visible, use the horizontal scroll bar to scroll right until the DELETE icon **X** is visible.



Figure 19: Document Delete

#### 4.3.6 Rejected Documents

A document in Rejected status has been reviewed by the ODIS Admin and returned to the Publisher to take some action. A rejected document is only visible to the Publisher who submitted the document to the ODIS Admin for review. The ODIS Admin may communicate the reason for the rejection in the comment section or send a communication external to ODIS.

If there are changes and/or edits to be made to the rejected document, the Publisher can click the EDIT icon  to upload the revised version of the document (see Figure 14) . To resubmit the document to the ODIS Admin, select **Review** for document status. Documents in Review status are routed to the ODIS Admin queue and is no longer editable by the Publisher.

If the rejected document is no longer needed. The document may be removed from the Publisher Work Area by clicking the DELETE icon **X**. Documents may only be deleted from the Publisher Work Area if the status equals **In Progress**.

To remove a rejected document from ODIS, from the Publisher Work Area:

1. Click the EDIT icon 
2. Change the Status to In Progress
3. Click SAVE
4. Scroll to far right, click the DELETE icon X. (Publishers Work Area)

## 4.4 Revise or Update a Document

ODIS documents may need to be revised or updated. There are two ways in which the Publisher can view the current version of an ODIS document, from the ODIS public website at:

<http://odis.dhs.ga.gov> or from the ODIS Publisher Portal, Published Documents grids. The ODIS public website will only have the latest version of a document. However, if a document has multiple versions, the Publisher or Administrator may view all existing versions of a document from the Published Documents grid.

### 4.4.1 Viewing Document Versions

To view existing versions of a document, from the Publisher **Manage Documents** page, go to **Published Documents** grid, navigate to the document of choice, click the caret  to expand the versions sub-window. In the example shown in **Figure 20: Document Revisions - View Document Versions**, the document has four (4) versions. The Publisher may scroll to the right of the grid to view the create date for the different versions and the expiration date if applicable. All the past versions of the document may be viewed, by downloading the document.

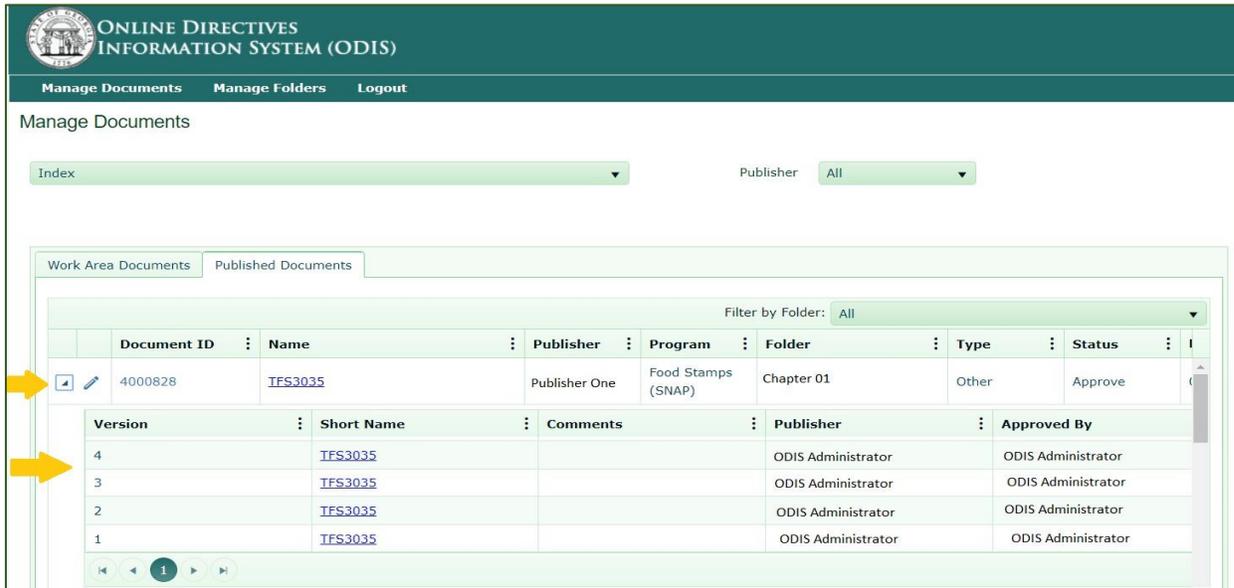


Figure 20: Document Revisions - View Document Versions

### 4.4.2 Update or Revise a Published Document

To add a new version or update a published document, from the **Published Documents** grid click the edit icon  to display the Manage Document form, and then:

1. Click **Select Files** to browse for the revised document to upload
2. Select the **Status**. Either **In-Process** or **Review**.

Selecting **Review** will send the document to the ODIS Admin

Selecting **In-Process** the document will move to your Work Area. The document will remain in your work area until the status is changed to **Review**.

3. **Folder** – if you are Publisher of the current version of the document, the folder will default to the existing folder.

If a different Publisher published the current version of the document, a Folder must be selected.

4. Add any Comments or Keywords (Optional)
5. Click Save.

Figure 21: Document Revisions - Upload Revise Document

In **Figure 22: New Document Version Added**, a new document version is created, Version 5. Version 5 has not been approved by the ODIS Admin, the **Publisher** and the **Approved by** fields for Version 5 are blank. To route the revise document to the ODIS Administrator/Manager, click on the edit icon  and change the Status to Review.

ONLINE DIRECTIVES INFORMATION SYSTEM (ODIS) Welcome Lynn Walker  
Last Login: 10/25/2018 12:07:35 PM

Manage Documents Manage Folders Logout

Manage Documents

Index Publisher All

Work Area Documents Published Documents

Filter by Folder: All

| Document ID | Name    | Publisher     | Program            | Folder     | Type  | Status  |
|-------------|---------|---------------|--------------------|------------|-------|---------|
| 4000828     | TFS3035 | Publisher One | Food Stamps (SNAP) | Chapter 01 | Other | Approve |

| Version | Short Name | Comments | Publisher          | Approved By        |
|---------|------------|----------|--------------------|--------------------|
| 5       | TFS3035    |          |                    |                    |
| 4       | TFS3035    |          | ODIS Administrator | ODIS Administrator |
| 3       | TFS3035    |          | ODIS Administrator | ODIS Administrator |
| 2       | TFS3035    |          | ODIS Administrator | ODIS Administrator |
| 1       | TFS3035    |          | ODIS Administrator | ODIS Administrator |

Figure 22: New Document Version Added

**RECAP** – Revise or Update a Document

1. Log into the ODIS Publisher Portal
2. Go to Manage Documents
3. Click on Published Document
4. Retrieve document to be revised or updated
5. Click the EDIT icon to display Manage Document form
6. Upload revised or updated document
7. Change Status
8. Add Comments or Keyword (Optional)
9. Click Save.



1. Do not put a document in Review status until the document is ready to be reviewed by the ODIS Administrator/Manager for approval to publish to the ODIS public website.
2. While the document that is being revised or updated, it will be accessible from your Work Area Documents grid.
3. Once the document is Approved it will move to the Published Document grid.
4. If you revise or update a document that was originally Published by another Publisher within your Program, you become the Publisher of the newly revised document

### 4.4.3 Managing Published Documents

The Published Documents view contains all documents that have been approved to be published to the ODIS public website (<https://odis.ga.gov>). The published documents are active documents in approved status without an expiration date or an expiration date that is greater than the current date (i.e., if there is an expiration date, it is a future date). Also, these documents are accessible to anyone with an internet connection that visits the ODIS public website. Hence, the importance of managing Published documents.

The Published Document view is defaulted to display documents that were published to the logged-in user. To view all a Program published documents regardless of the Publisher, select **ALL** from the Publisher drop down. In addition, if the Publisher manages documents for more than one DHS or DFCS Program, the **Index** feature can be used to filter the display of documents to one specific program. Programs can also be filtered by clicking the eclipse  in the “Program column in the document grid. *See **Error! Reference source not found.***

When adding a new document or revising an existing document that was originally published by a different Publisher, ODIS requires the user to select a Folder for the document. As mention in Section 4.2, folders are unique to the Publisher and cannot be shared with other Publishers. The folders, however, may assist in managing published documents. Folders can be used to group documents by subject matter, manual chapters, or etc.



Figure 23: Published Document View

### 4.4.3.1 Exporting a List of Published Documents

There is an **Export Excel** button on the Published Documents view, that allows a list of ODIS published documents to be exported to a MS Excel spreadsheet. The complete list of published documents for a Program may be downloaded, or the **Filter by Folder** feature can be used to view and download published documents by folder.

An example of the MS Excel export of published documents is shown in Figure 24, below. The MS Excel export can be used to communicate to the ODIS Administrator/Manager documents that should be expired or set to inactive. Documents that are expired or set to inactive **are not accessible** on the ODIS public website. To ensure the ODIS website contains the most current information, a review of Published documents should be performed periodically.

| Document ID | Name           | Publisher     | Program             | Date Approved | Expiration Date |
|-------------|----------------|---------------|---------------------|---------------|-----------------|
| 4003724     | Document One   | Publisher One | DHS or DFCS Program | 4/8/2019      | 12/20/2021      |
| 4004230     | Document Two   | Publisher One | DHS or DFCS Program | 12/20/2015    | 12/20/2021      |
| 4000241     | Document Three | Publisher One | DHS or DFCS Program | 10/1/2017     |                 |
| 3006582     | Document Four  | Publisher One | DHS or DFCS Program | 9/30/2018     |                 |
| 4001060     | Document Five  | Publisher One | DHS or DFCS Program | 6/30/2019     |                 |
| 3005742     | Document Six   | Publisher One | DHS or DFCS Program | 12/31/2017    | 12/31/2019      |

Figure 24: MS Excel Export of Published Documents

## 4.5 Multiple Publishers

### 4.5.1 Multiple Publisher

The multiple publisher functionality allows Publishers assigned to the same Program(s) within a DHS Division or Office to view and edit documents in each other Work Area Documents and Published Documents. The Publisher is defaulted to the Publisher who is logged in. However, the Publisher may expand the Publisher drop-down list and select **ALL**. ALL displays any Publishers, past or present who published document for the defaulted Program.

For example, the Publishers in **Figure 25: Multiple Publishers** are assigned to the Child Welfare Program. There are three Publishers: Jane Doe, Bob Smith, and Mary J. Smith. When Jane Doe logs into ODIS, the Publisher will default to Jane Doe however, Jane can expand the drop-down list and select **All** to view all documents published for the Child Welfare

program by any Child Welfare Publisher. To view the documents of one specific Child Welfare Publisher, filter the Publisher column accordingly.

Any save changes made to a document, will update the Publisher to the Publisher name who last modified the document. This applies to both Work Area Documents and Published Documents.

The screenshot shows the 'Manage Documents' interface. At the top, there are navigation links: 'Manage Documents', 'Manage Folders', and 'Logout'. Below this, the page title is 'Manage Documents'. There is a search bar labeled 'Index' and a 'Publisher' dropdown menu currently set to 'All'. The dropdown menu is open, showing 'All' and 'Jane Doe' as options. Below the search bar, there are two tabs: 'Work Area Documents' and 'Published Documents'. The 'Published Documents' tab is active. There is a '+ Add new record' button and a 'Filter by Folder' dropdown. The main content is a table with the following columns: Document ID, Name, Publisher, Program, Folder, Modified Date, and Expiration Date. The table contains four rows of data.

| Document ID | Name                        | Publisher     | Program       | Folder                | Modified Date | Expiration Date |
|-------------|-----------------------------|---------------|---------------|-----------------------|---------------|-----------------|
| 4004128     | Foster Care Demo Guidelines | Mary J. Smith | Child Welfare | Folder 01: Guidelines | 4/27/2018     | 5/10/2018       |
| 4003997     | Adoption Demo Guidelines    | Jane Doe      | Child Welfare | Folder 01: Guidelines | 5/1/2018      |                 |
| 4003982     | Foster Rates by County Demo | Mary J. Smith | Child Welfare | Folder 12: Rates      | 5/1/2018      |                 |
| 4003981     | Foster Care Refusal Demo    | Bob Smith     | Child Welfare | Folder 99: Rejections | 8/25/2017     |                 |

Figure 25: Multiple Publishers

## 5.0 Glossary

|                                     |  |
|-------------------------------------|--|
| <b>Administrator</b> . . . . .      | <i>The OAM Administrator/manager is the ODIS Analyst.</i>  |
| <b>Approved (Status)</b> . . . . .  | <i>The document has been reviewed by the ODIS Administrator/Manager and has received the required administrative approval to be published to the ODIS website.</i> |
| <b>Directive</b> . . . . .          | <i>Directives are statements of policies, procedures or manuals that are developed to accomplish the goals of the Department of Human Services (DHS).</i>          |
| <b>Document ID</b> . . . . .        | <i>A unique identifier systematically generated and assigned to each document that is uploaded to ODIS.</i>  |
| <b>Document</b> . . . . .           | <i>A document for this publication purposes is a policy or manual.</i>   |
| <b>In Review (Status)</b> . . . . . | <i>The document has been submitted to the ODIS Administrator/Manager for review and/or approval to the publish on the ODIS public website.</i>                     |
| <b>Pending (Status)</b> . . . . .   | <i>The ODIS Administrator/Manager has placed the document on hold for review at a later time. Or publishing of the document has been postponed.</i>                |
| <b>Publisher</b> . . . . .          | <i>Program staff responsible for uploading documents to the ODIS application.</i>  |
| <b>Rejected (Status)</b> . . . . .  | <i>The ODIS Administrator/Manager has returned the document to the Publisher for edits or corrections.</i>   |

For support regarding the ODIS process, contact the OAM at [ODIS@dhs.ga.gov](mailto:ODIS@dhs.ga.gov). Documents related to this process are provided on the agency intranet under The Office of General Counsel.