

Adding a Standard to the OMES IS Process Library

USER GUIDE

Office of Management &
Enterprise Services

Information Services

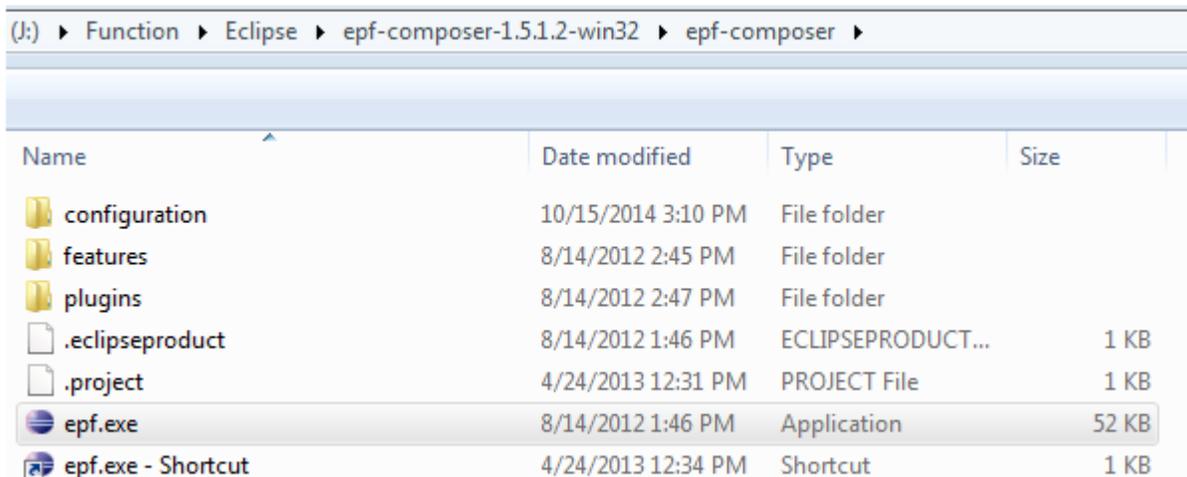
August 2015



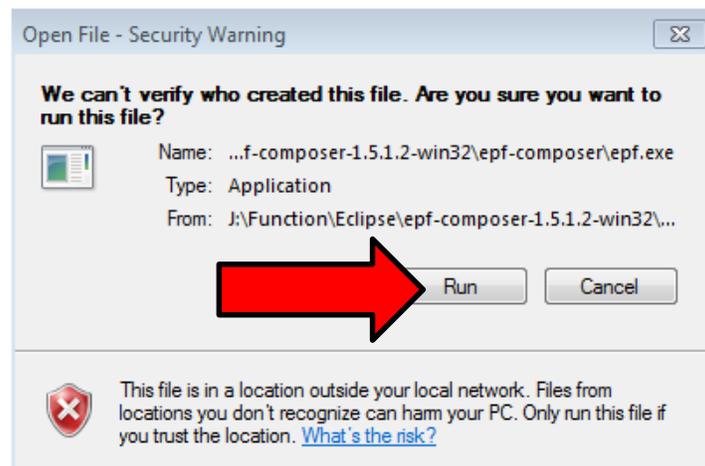
The purpose of this user guide is to walk the user through the steps of adding an approved operating standard to the OMES IS Process Library. The OMES IS Process Library can be located online at <http://eclipse.omes.ok.gov/>. The operating standards are located under **Disciplines < ISD Operating Standards**.

Opening Eclipse Composer and Locating the Operating Standards

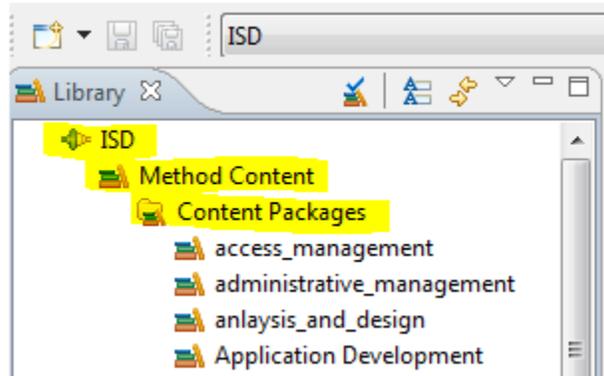
1. The OMES IS Process Library is maintained and edited with the Eclipse Composer. To locate the Eclipse Composer, go to the following Network Folder address:
J: Drive < Function < Eclipse < epf-composer-1.5.1.2-win32 < epf-composer
2. In the epf-composer folder, double-click **epf.exe**.



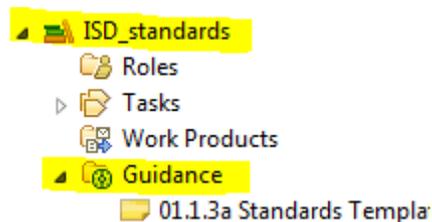
Note: If a security warning window pops up, click the **Run** button.



3. When the Eclipse Composer opens, you will see a Library window in the upper left part of the screen. Click the arrow in front of **ISD** to open the dropdown menu. Open the dropdown menus for **Method Content** and then **Content Packages**.



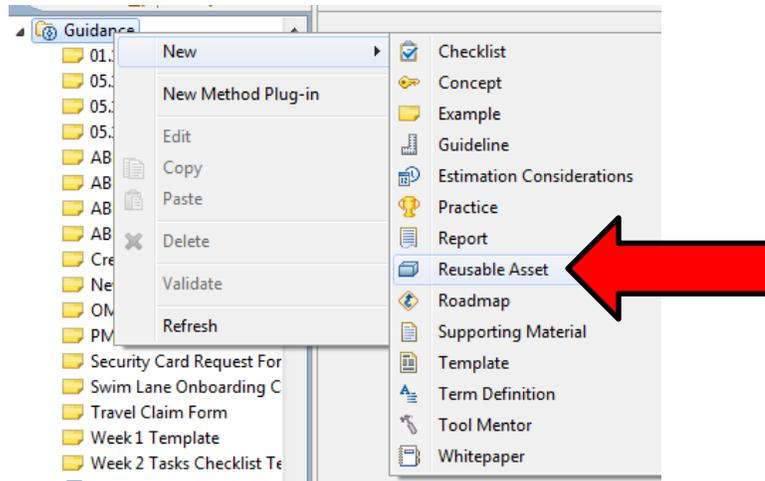
4. Under Content Packages, click the **ISD_standards** dropdown arrow. Then click the **Guidance** dropdown arrow. All of ISD's operating standards, along with their attachments, are saved under this Guidance folder.



Adding an Approved Standard

1. After an operating standard has been approved and made 508 compliant, it is ready to be posted in the OMES IS Process Library, at the following location:
ISD < Method Content < Content Packages < ISD_standards < Guidance

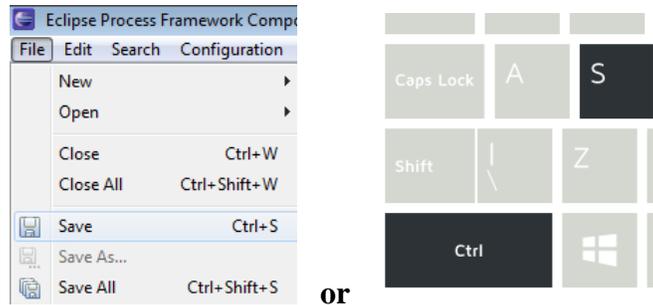
2. Right-click **Guidance** and select **New**. Then click **Reusable Asset**. This will open a new reusable asset, which is how you will save the operating standard.



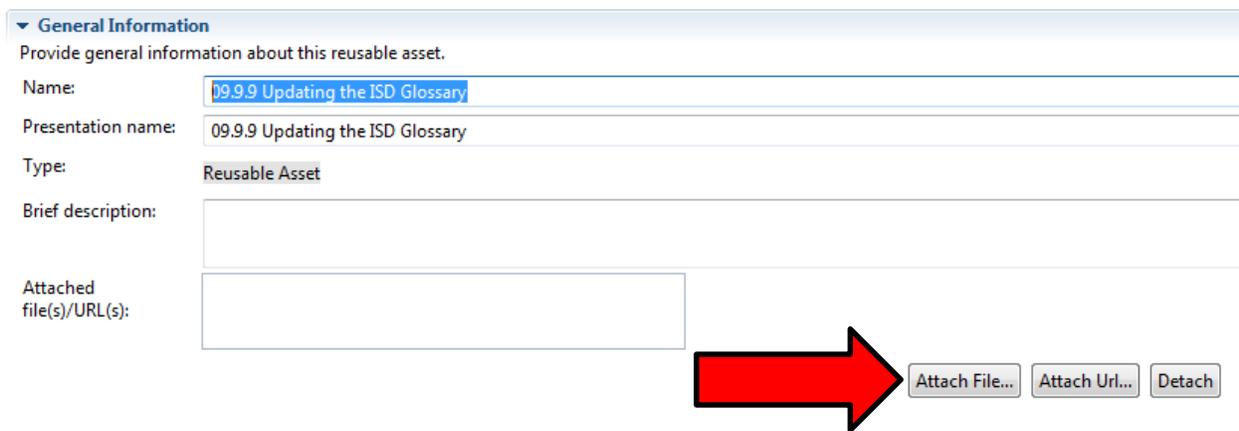
3. In the new reusable asset screen, enter the name of the operating standard, beginning with the Standard Number, in the **Name** field. (i.e. 09.9.9 Updating the ISD Glossary) Then copy and paste that same name in the **Presentation name** field.

A screenshot of a software interface showing a form for creating a new reusable asset. The title bar reads '*09.9.9 Updating the ISD Glossary'. The main heading is 'Guidance (Reusable Asset): 09.9.9 Updating the ISD Glossary'. Below this is a section titled 'General Information' with the instruction 'Provide general information about this reusable asset.' The form contains three fields: 'Name:' with the value '09.9.9 Updating the ISD Glossary', 'Presentation name:' with the value '09.9.9 Updating the ISD Glossary', and 'Type:' with the value 'Reusable Asset'.

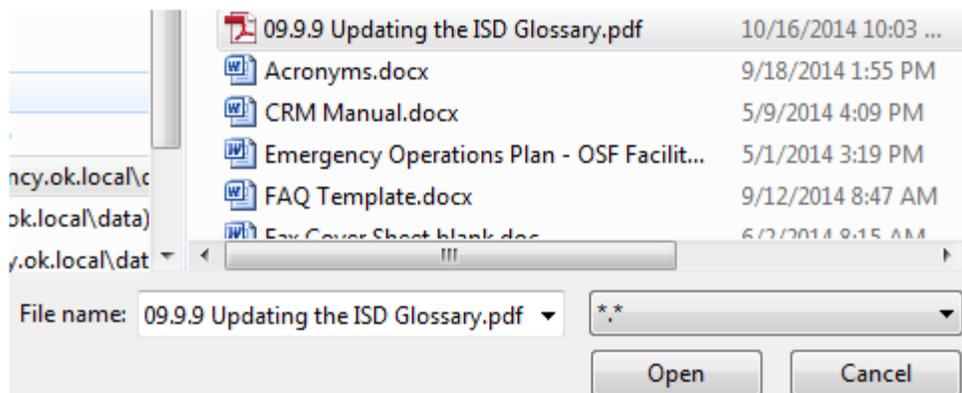
4. It is best to save your work as you progress. The easiest ways to do this are to either go to the **File** tab and select **Save** or to select the **Control** key and the **S** key on your keyboard.



5. After you have saved the new reusable asset, you are ready to attach the PDF of the standard. Click the **Attach File** button.



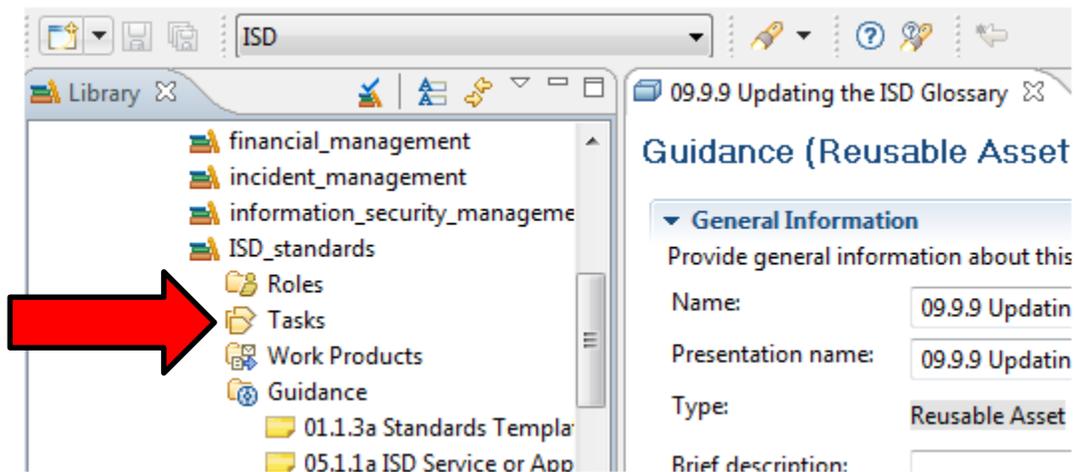
6. Select the operating standard you want to attach and click the **Open** button. After the standard is attached, save the page again, but leave the reusable asset page open.



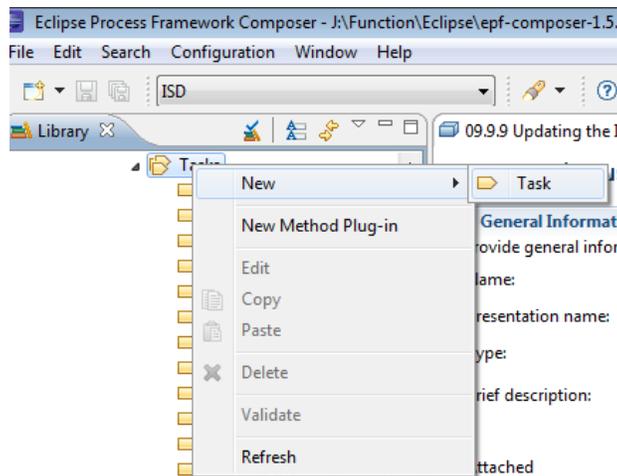
Adding Tasks and Roles

Each operating standard that is added to the OMES IS Process Library should be related to at least one task and at least one role. After the operating standard has been attached, it is time to relate it to tasks and roles.

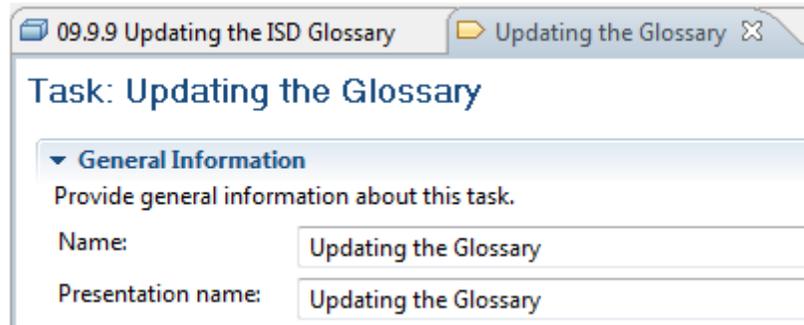
1. In the Library window, under ISD_standards, you will notice the **Tasks**. Click the **Tasks** dropdown menu.



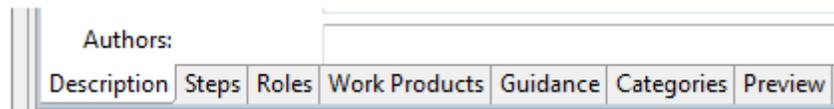
2. Right-click **Tasks**, select **New** and click **Task**. This will open a new task.



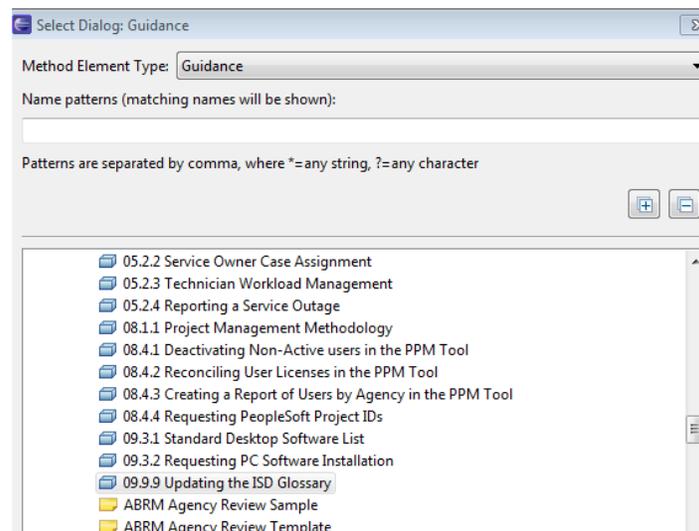
- In the new task screen, enter the name of a high-level task, involved with the new operating standard, in the **Name** field. (i.e. Updating the Glossary) Then copy and paste that same name in the **Presentation name** field. Remember to save your progress.



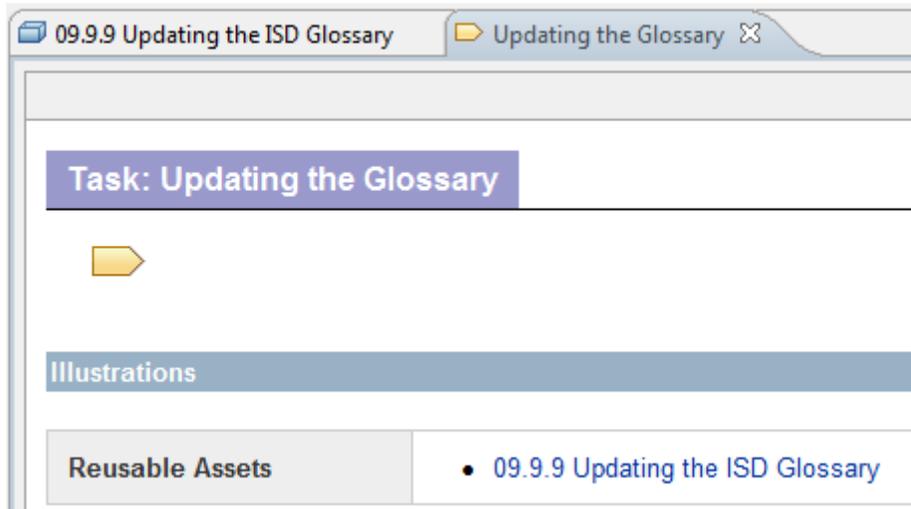
- At the bottom of the Task window, you will notice that you are currently on the **Description** tab and that there are many other tabs associated with the tasks.



- Click the **Guidance** tab. Then click the **Add** button on the right side of the screen. This will bring up a new window where you will want to select the operating standard to relate it to the new task you created.
- In the window, scroll down to ISD_standards and select the new operating standard. Then click the **OK** button. Remember to save.

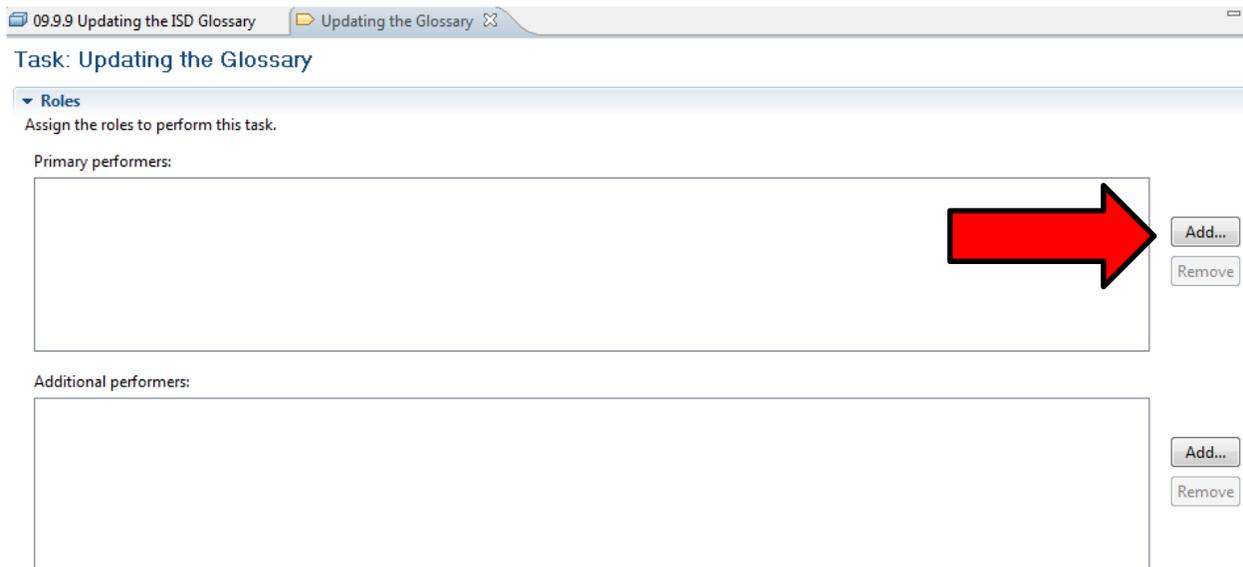


7. Click the **Preview** tab to the right of the Guidance tab. You will notice that the operating standard is now related on the Task page.



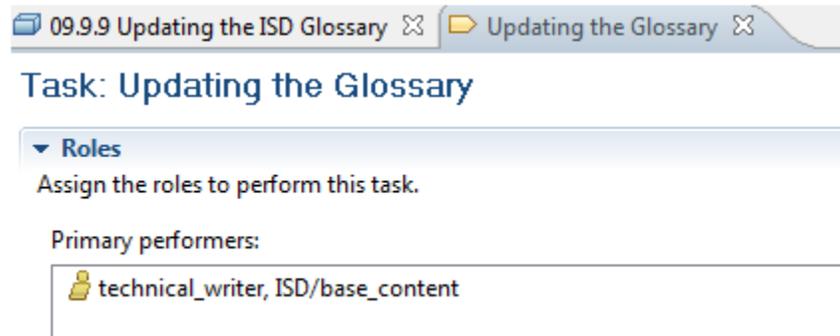
Note: If you still have the operating standard page open, go to it and click its **Preview** page. You will notice that the new task is related on this page.

8. You can create more than one task for an operating standard, if necessary. Just repeat these steps to create additional tasks as needed.
9. Return to the Task page and click the **Roles** tab at the bottom of the window.
10. On the Roles page, you will notice fields for Primary performers and Additional performers. Click the **Add** button next to Primary performers.

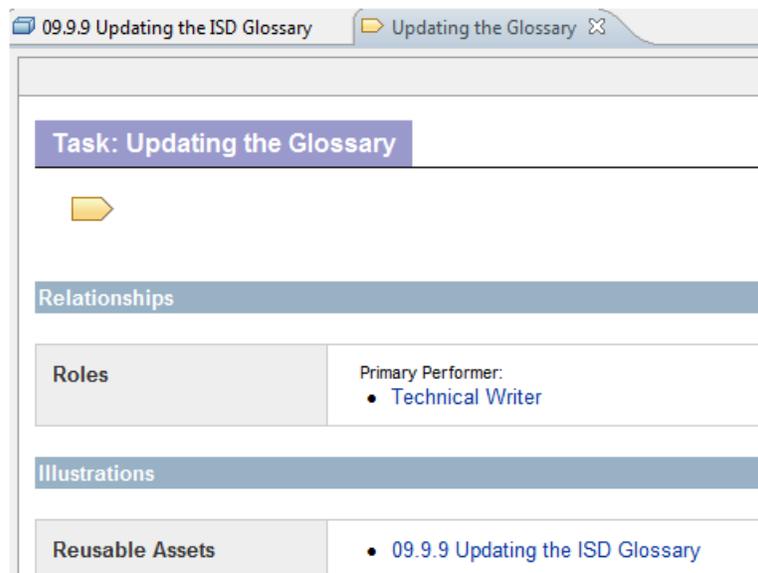


11. Locate the role(s) you want to add to the task and click the **OK** button. You can also add additional performers, if necessary, by clicking the **Add** button to the right of Additional Performers.

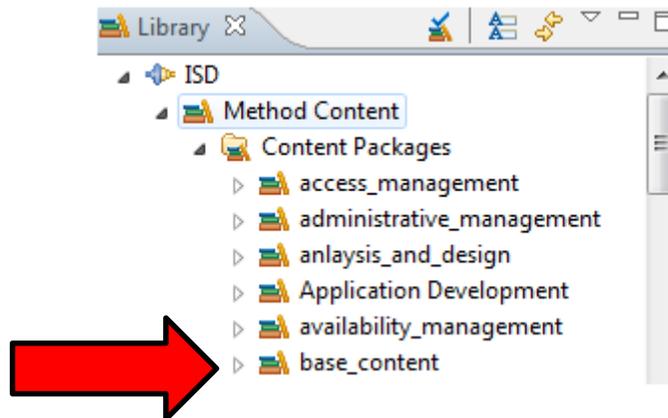
Note: You can select multiple roles by holding the **Control** key on the keyboard as you select the desired roles.



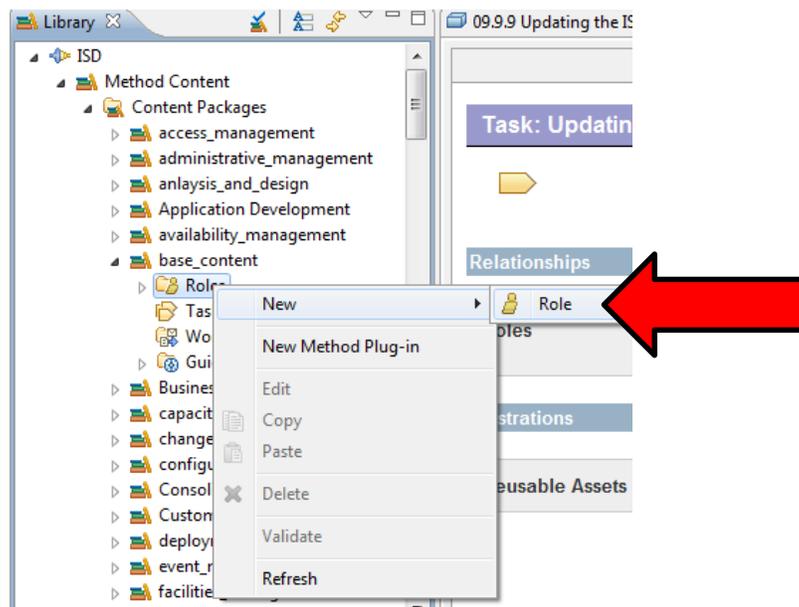
12. Click the **Preview** tab at the bottom of the Task page. You will notice that now both the operating standard and the role(s) are now related to the task. Be sure to save.



13. If you are unable to find a role, the following steps will show you how to create a new role.
- In the Library window, under **ISD < Method Content < Content Packages**, click the **base_content** dropdown arrow.



- Right-click **Roles**. Select **New** and then click **Role**.

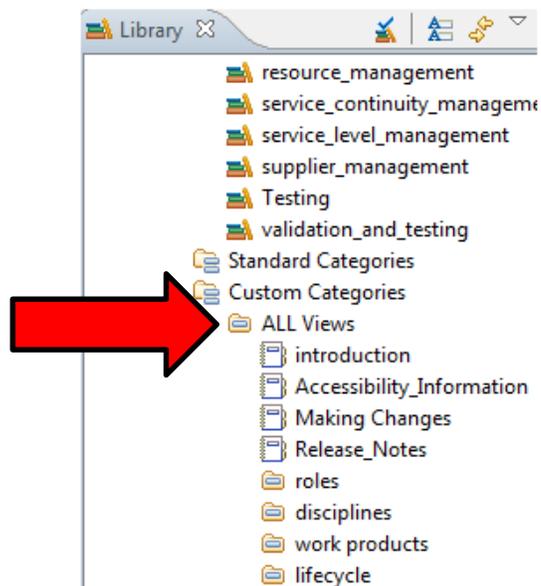


- Enter the name of the new role in the **Name** field. Copy and paste that name in the **Presentation name** field. Save the new role.
- Return to the **Roles** tab of the new Task. You will notice that the role you just created is now listed when you click the **Add** button for either Primary performers or Additional performers.

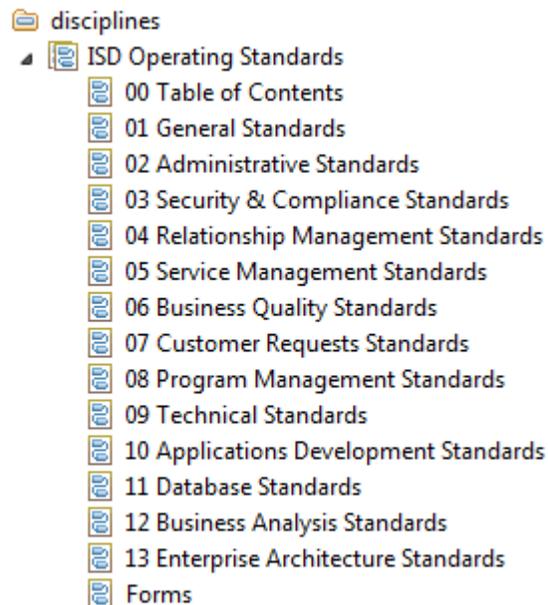
Migrating Standard and Tasks to View Access

Once the operating standard, task(s), and role(s) have been added to the OMES IS Process Library, they must be migrated to View access. Pages are created in the Eclipse Composer, but before they can be accessed by a wider audience, they must be migrated to View access.

1. In the Library window, scroll down to the bottom and click the **Custom Categories** dropdown arrow. Then click the **ALL Views** dropdown arrow.



2. Click the **disciplines** dropdown arrow. Then click the **ISD Operating Standards** dropdown arrow.



3. Double-click the appropriate numbered discipline under ISD Operating Standards. For example, if the new operating standard is 09.9.9 Updating the ISD Glossary, you would want to double-click the **09 Technical Standards** discipline.
Note: “Updating the ISD Glossary” is not actually a Technical Standard. The standard number “09.9.9” was chosen as a generic number to serve as an example for this user guide.
4. When you open the appropriate discipline (i.e. 09 Technical Standards), click the **Guidance** tab.
5. Click the **Add** button, select the operating standard, and click the **OK** button.
6. Next, click the **Tasks** tab.
7. Click the **Add** button, select the task, and click the **OK** button.
8. Once the operating standard and task have been added to the appropriate discipline, click the **Preview** tab. You will notice all the tasks and reusable assets that have been associated with that discipline. Be sure to save.
9. Close any open pages, making sure they are saved.