

OptiMiser ePortal Project Handling

The OptiMiser ePortal is a data handling system that extends the OptiMiser field tool. Its primary purpose is to enable collaboration without the need for email, cloud storage, or other separate system.

From within OptiMiser, users can:

- “Forward” projects to collaborators within the organization. Projects assigned to you from another user become available when you are connected to the internet and open the “Receive” or “Manage” screens.
- “Retrieve” projects assigned to them.
- “Submit” or archive projects to ePortal web storage.
- “Advance” projects through a workflow.

Files and Available Send Actions		
File Type	Possible Action	Result of Action
A user's own files	Submit	File gets archived (moved to ePortal with a status of 'U')
	Submit+Advance	Same as Submit, but in addition a copy of that project with the file name changed to the new label is put into files with a status of 'D' (and possibly reassigned to a different user)
	Forward	File gets moved to ePortal with a status of 'S' and presumably reassigned to new user
	Undo Receive	File on ePortal has status changed back to 'D' User will be warned if project has been modified. Users will also be allowed to reassign
Already archived files (i.e. those with the phrase ARCHIVED in front of the file name) (types U or P)	Delete, although for consistency it will be called Undo Receive	Files deleted on PC only.
Note that for all Send actions above, the files will also be deleted on the user's PC		
Manage Actions		
Any user's files that are eligible to be downloaded (D or S) but haven't yet	ReAssign	Can only be assigned, not relabeled. The file's ForUser field is changed to the new assignee
	Remove	The file's status is changed to 'X'
Any user's files that were downloaded and still	None	Generally no actions are available, since the files are at a user's PC.

presumably at the user's PC (R or T or A)		
	Undo Receive	File status on ePortal is changed back to D or S or a, and the user can reassign. Only given if the file is R or T and assigned to you OR if file is A and is seen on your PC.
Already archived files (types U and P)	Advance or ReAssign	If a new label (phase) is given, a copy of that project with the name changed to the new label is put into files with a status of 'D' (and possibly reassigned to a different user). If just a new assignee is given the project in upfiles gets the new assignee
	Remove	The file's status is changed to 'X'