



# Document Management System (DMS) Quick Guide

## What is DMS?

A nationally standardized filing system for electronic documents.

## Who can access DMS?

NRCS employees and affiliates with Protracts roles and permissions.

## Who can upload documents to DMS?

- zRoles designation
  - Designated Conservationist
  - Planner
  - State Programs
  - Farm Bill Specialist
  - Contract Support
  - Regional Conservationist

## What is the function of DMS?

Integrated search functionality allowing users to link documents to a Protracts participant or agreement (contract).

## How do I access DMS?

Protracts Home Page.

## Where is training material available for DMS?

National User Guide and Training Material (available at the Protracts Home Page).  
Statewide Training Material (Missouri Sharepoint or District Intranet site).

## What types of files can be uploaded?

- Word
- Excel
- PDF
- Text
- Scanned documents

## Is DMS secure?

Uploaded documents do not need to be encrypted or password protected.

## What is the purpose of versioned, replaced, and deleted in DMS?

- When a document is versioned, users can view and retrieve previous versions from the document tab.
- When a document is replaced, only the latest version will be viewable in DMS.
- Deleted documents are not recoverable.

## What should be remembered when uploading documents?

Insure the document is properly orientated.

Insure the document is in the proper category.

- Reminder - documents are viewable through Conservation Client Gateway.