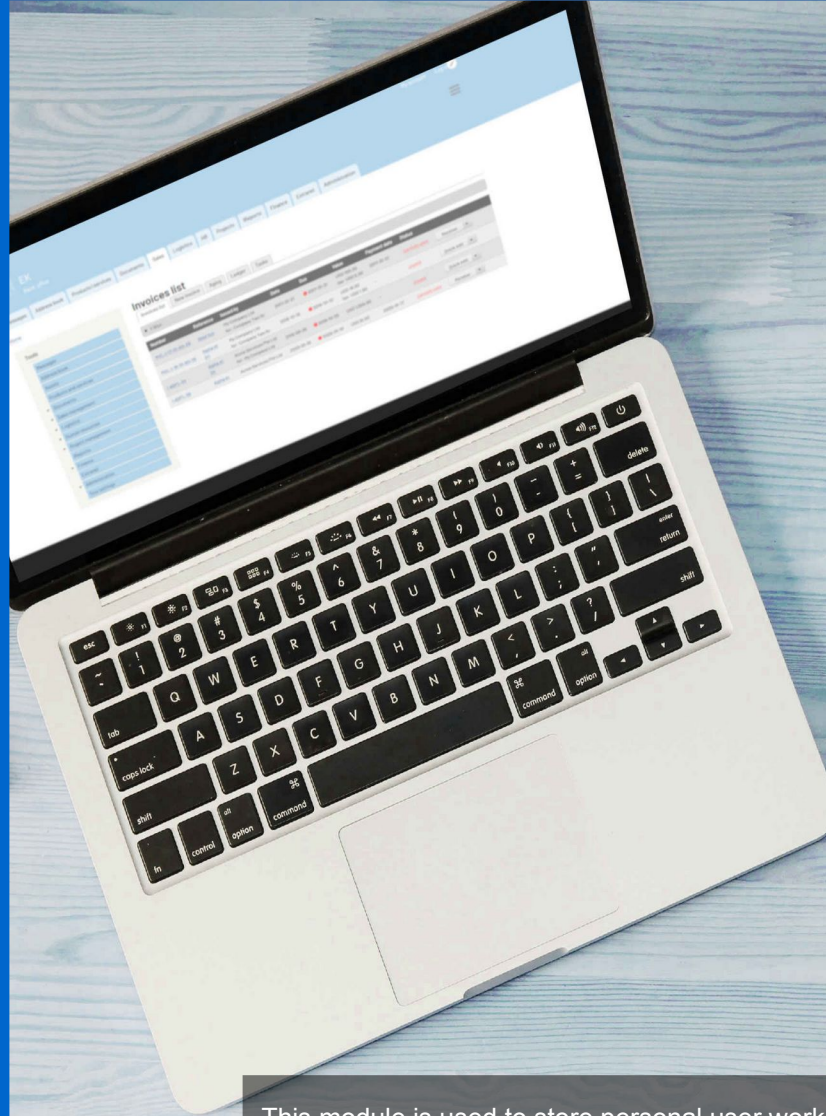


Documents module



This module is used to store personal user working documents.
Once uploaded documents can be shared or posted to project if available



Documents

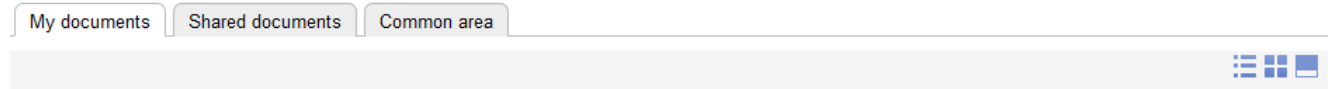
The documents module manages documents:

- upload;
- download;
- share with collaborators;
- post to projects (if projects module is available)

Documents are classified in 3 categories:

- 1) My documents
- 2) Shared documents from other users
- 3) Common area

Documents



The screenshot shows the 'Upload document' form. It has a title 'Upload document' and a section 'Select file'. Inside 'Select file', there is a 'Browse...' button and the text 'No file selected.'. Below this is a text input field with the placeholder 'tag or folder' and a small circular icon to its right. At the bottom of the form is an 'Upload' button.

To upload a document, select the file with upload form from

- 1) My documents
- 2) Common area

You can enter any tag or folder name to classify your document per folder

Documents

My documents

Documents

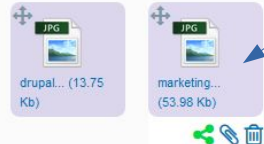
My documents | Shared documents | Common area

Use those buttons to change display (blocks or list and toggle folders view)



manual 2 document(s)

Once uploaded, the documents are displayed by folder (tag)



moved from share folder 2 document(s)

pictures 3 document(s)

Use this button to drag item to a different folder



Click to download

Share with collaborators
green color indicates the document is already shared

Delete

Post document to project



Documents

My documents:

Filter

The image shows a 'Filter' dialog box with the following elements and callouts:

- Filter** (dropdown menu)
- Search with keyword** (input field) - Callout: "Enter a keyword to search for"
- from** (label) above **YYYY-mm-dd** (input field)
- to** (label) above **2015-08-17** (input field) - Callout: "OR input a date range"
- Apply** (button) - Callout: "Click 'Apply' to launch search"
- Overall callout: "Use filter to search a document by name or date range"

Documents

My documents:

Dragging item into another folder



Documents

Share a document

Share dialog form

Document: drupal.jpg

not shared

user2 [extranet]

shared

user [manager]

Right column: shows users the document is shared with.

Left colum: click on user to select for sharing document

If no restriction, all active users are listed with main role (see settings for permission restriction)

Select in left column users to share document with

New company logo shared with you

Custom message notification

Check the box to notify users about the shared document

Send notification

normal
priority

05 / 30 / 2015
Optional expiration date

You can add a deadline for expiration of share action. After this date the document will not be accessible to users

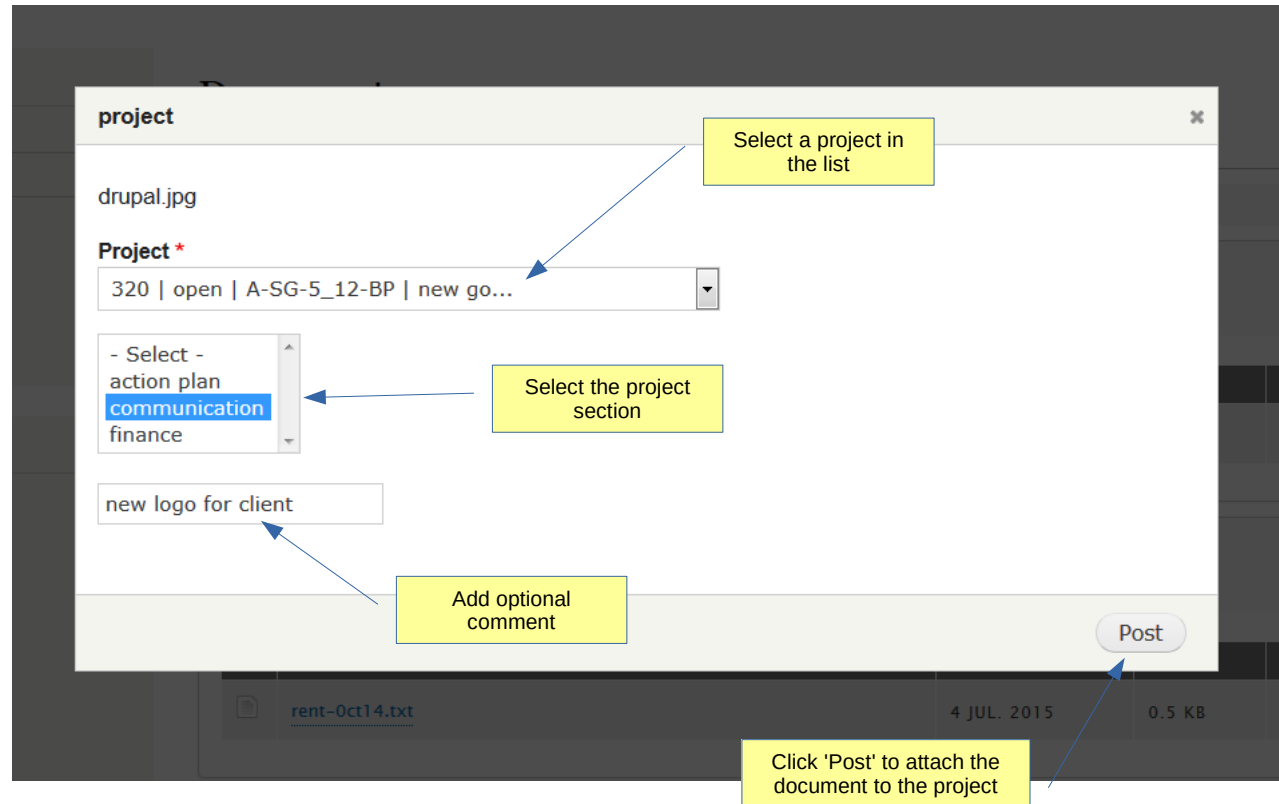
Click to confirm

Share

Documents

Post document to project

(See projects management module for further details)



Documents

Delete

The screenshot shows a 'Documents' interface with two tabs: 'My documents' and 'Shared documents'. Under 'My documents', there are two folders: 'pictures' and 'work'. The 'pictures' folder contains a table with one document: 'drupal.jpg', dated '30 JUL 2015'. A 'Confirm' dialog box is overlaid on the table, with the text 'delete drupal.jpg'. A blue arrow points from a yellow callout box to the 'Confirm' dialog. The callout box contains the text: 'When clicking on 'delete' a confirmation dialog will be displayed before deletion. Click on 'delete' again to confirm or 'X' to cancel.'

Document	Date
drupal.jpg	30 JUL 2015

Document	Date
----------	------

Documents

Shared documents

Documents

Documents shared by other users with you are listed in 'Shared documents' tab'. Icon indicates the latest new shared document(s) number.

Folder name is the name of user who shares the documents with you

7 document(s)

Document Name	Size	Format
Sample-doc...	30.14 Kb	ODT
abc_logo...	11.48 Kb	new
computer_tab...	66.12 Kb	PNG
computer_tab...	0 Kb	PNG
documents...	248.3 Kb	PDF
excel...	17.54 Kb	JPG
marketing...	53.98 Kb	JPG

New share

Click to download

export_Addre...
(8.26 Kb)

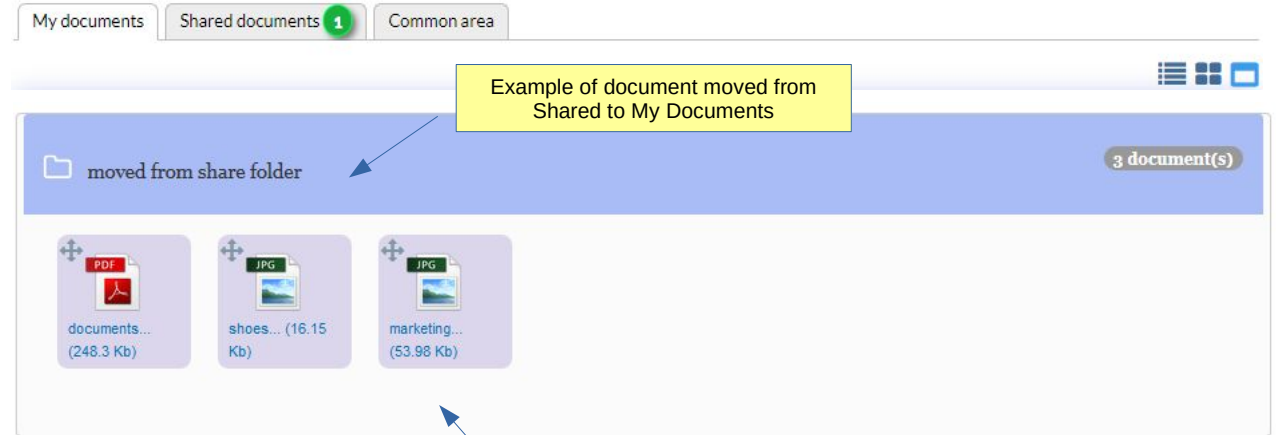
Move the document to 'My documents'

Remove this document from the list

Documents

Move document

Documents



Documents

Common documents

This section can be used to share files with all system users without restriction

Documents

My documents | Shared documents | Common area

Common documents area is where files can be uploaded and shared by all users



Files in this section are accessible by all users

logo 1 document(s)

windows-erro... (48.15 Kb)

File can be deleted only by user with the proper permission

Upload document

File will be accessible in common area.

Select file

Browse... No file selected.

tag or folder

Upload

Upload form will indicate you are sharing file with everybody

Documents

Optional – upload file via email

Based on **server configuration**, you may have option to automatically upload files to your personal folder

file

document @mydomain.com

file

Draft proposal.pdf (24K)

Direct email to "document" on you application domain. Email must be sent be registered user.

Subject will be used as folder name

Attach 1 or more files to be saved in your documents

EK document received

Inbox x

Email confirmation receipt

Ubuntu <ubuntu@mydomain.com >
to me

File(s) saved: Draft proposal.pdf

file

My documents on the server

Draft_propos ...
(24.5 Kb)

Documents

Settings

Settings let you configure some of the document module options

Authorized file formats upload. List file extensions separated by **space**

Settings

Allowed extensions *

csv png gif jpg jpeg bmp txt doc docx xls xlsx odt ods odp pdf ppt pptx sxc rar rtf tiff zip

Enter file extensions separated by a space

Filter special characters in file name *

yes ▾

Restrict upload

This option if selected will filter filename with non authorized characters

Restrict share to user with module permission *

no ▾

Access documents management

This option if selected will restrict user listed for share to those having permission to access this module

Record

Documents

User delete

When deleting user account, the personal documents of that account can be moved to existing account

User cancel form confirmation

Are you sure you want to cancel these user accounts? ☆

[Home](#) » [Administration](#) » [People](#)

- test

When cancelling these accounts

- Disable the account and keep its content.
- Disable the account and unpublish its content.
- Delete the account and make its content belong to the *Anonymous* user.
- Delete the account and its content.

Require email confirmation to cancel account

When enabled, the user must confirm the account cancellation via email.

This action cannot be undone.

Move user documents

use

user

user2

Select an existing user to move personal documents to

Cancel accounts

Cancel

Confirm



AREA
Systems

EK