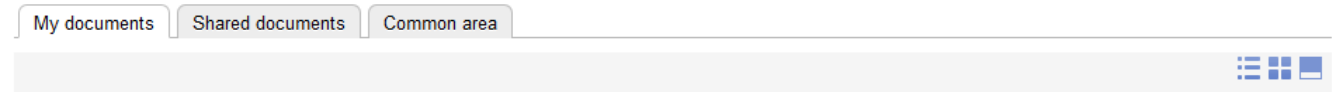Overview of documents module

Documents

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

Documents

| My documents | Shared documents | Common area |

Upload document

Select file

Browse_   No file selected.

tag or folder

Upload

Documents

My documents

Documents

My documents | Shared documents | Common area

📁 manual   2 document(s)

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

JPG
drupal... (13.75 Kb)

JPG
marketing... (53.98 Kb)
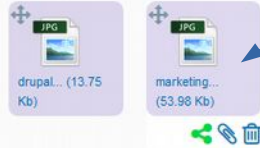
📁 moved from share folder   2 document(s)

📁 pictures   3 document(s)

JPG
excel... (17.54 Kb)

JPG
EH... (46.63 Kb)

JPG
asia... (49.42 Kb)

Use this button to drag item to a different folder

JPG
marketing... (53.98 Kb)

Click to download

Share with collaborators
green color indicates the document is already shared

Delete

Post document to project
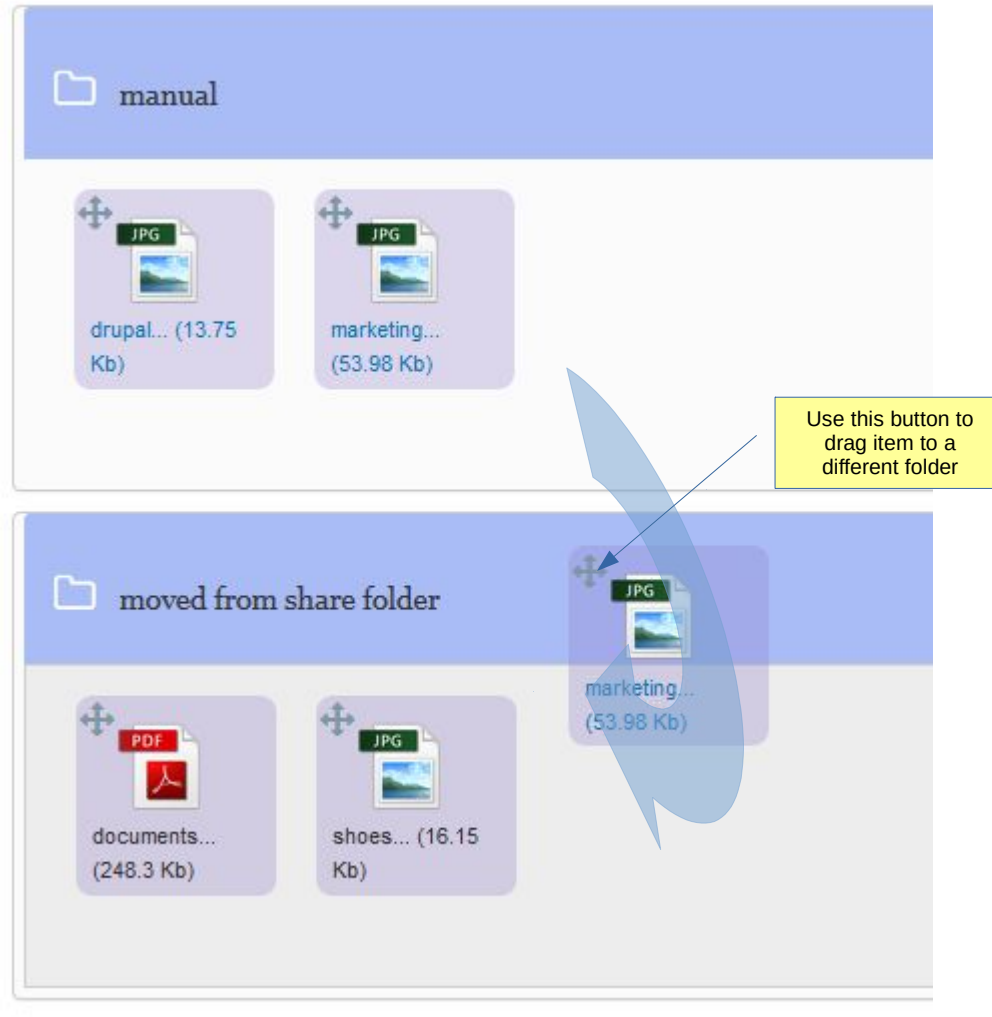
Documents

My documents:

Filter

Filter

Search with keyword

from

YYYY-mm-dd

to

2015-08-17

Apply

Use filter to search a document by name or date range

Enter a keyword to search for

OR input a date range

Click 'Apply' to launch search

Documents

My documents:

Dragging item into another folder

Use this button to drag item to a different folder

Documents

Share a document

Share dialog form

Share

Document: drupal.jpg

not shared

user2 [extranet]

Left colum: click on user to select for sharing document

shared

user [manager]

Right colum: shows users the document is shared with.

If no restriction, all active users are listed with main role (see settingsfor 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
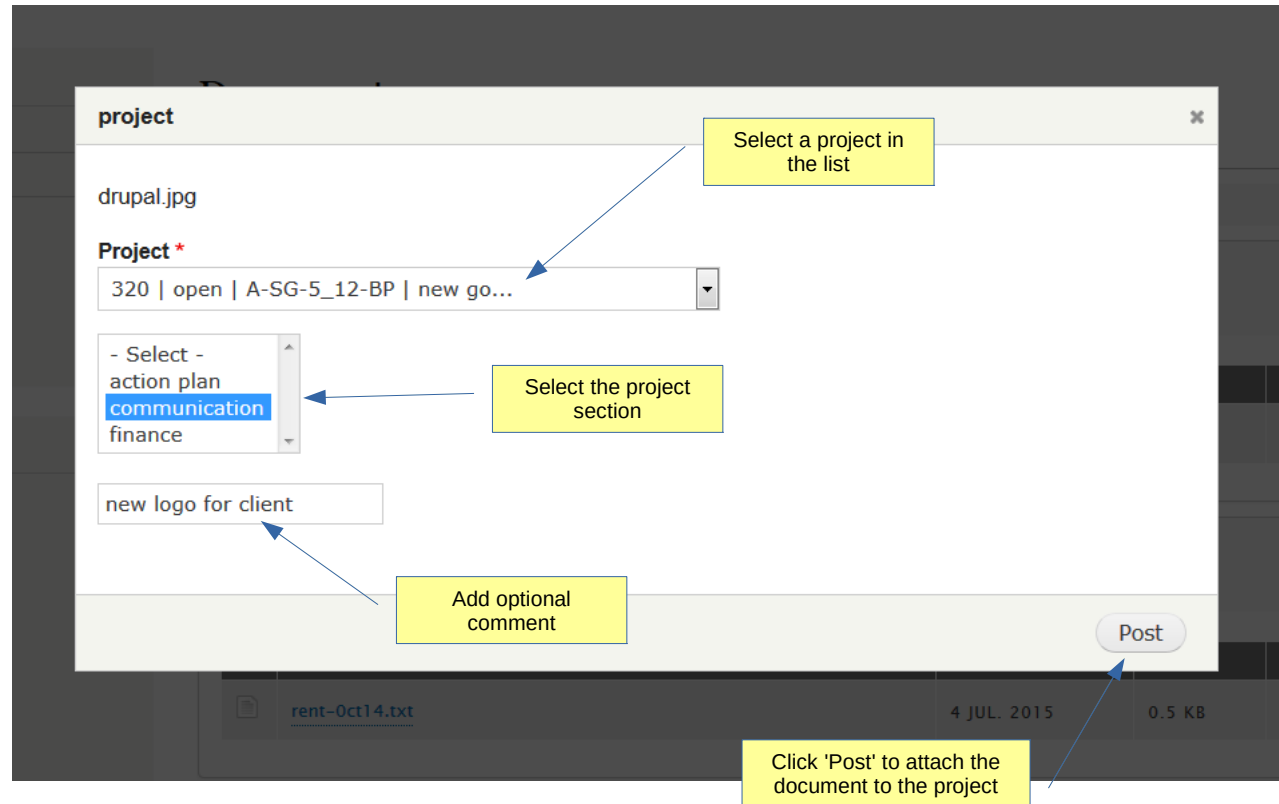
Click to confirm

Share

Documents

Post document to project

(See projects management module for further details)

project   ✕

drupal.jpg

Project *

| 320 | open | A-SG-5_12-BP | new go... | ▾ |

| - Select - |
| action plan |
| **communication** |
| finance |

new logo for client

Post

rent–0ct14.txt   4 JUL. 2015   0.5 KB

Select a project in the list

Select the project section

Add optional comment

Click 'Post' to attach the document to the project

Documents

Delete

Documents

Shared documents

Documents

| My documents | Shared documents | Common area |

Documents shared by other users with you are listed in 'Shared documents' tab

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

📁 user

1 document(s)

XLSX
export_Addre...
(8.26 Kb)

Click to download

XLSX
export_Addre...
(8.26 Kb)

Move the document to 'My documents'

Remove this document from the list
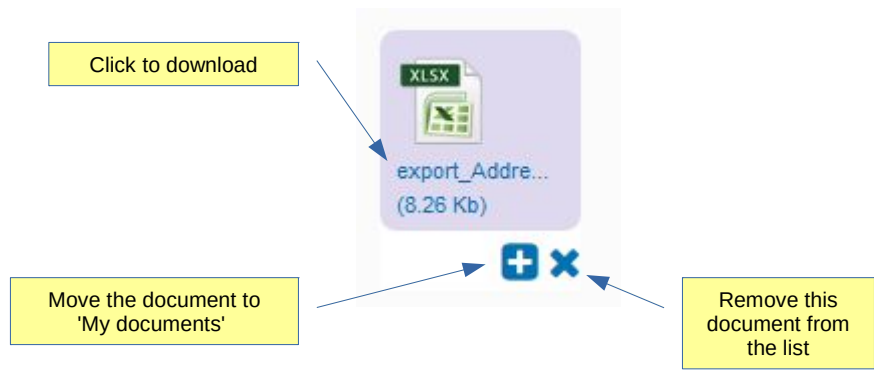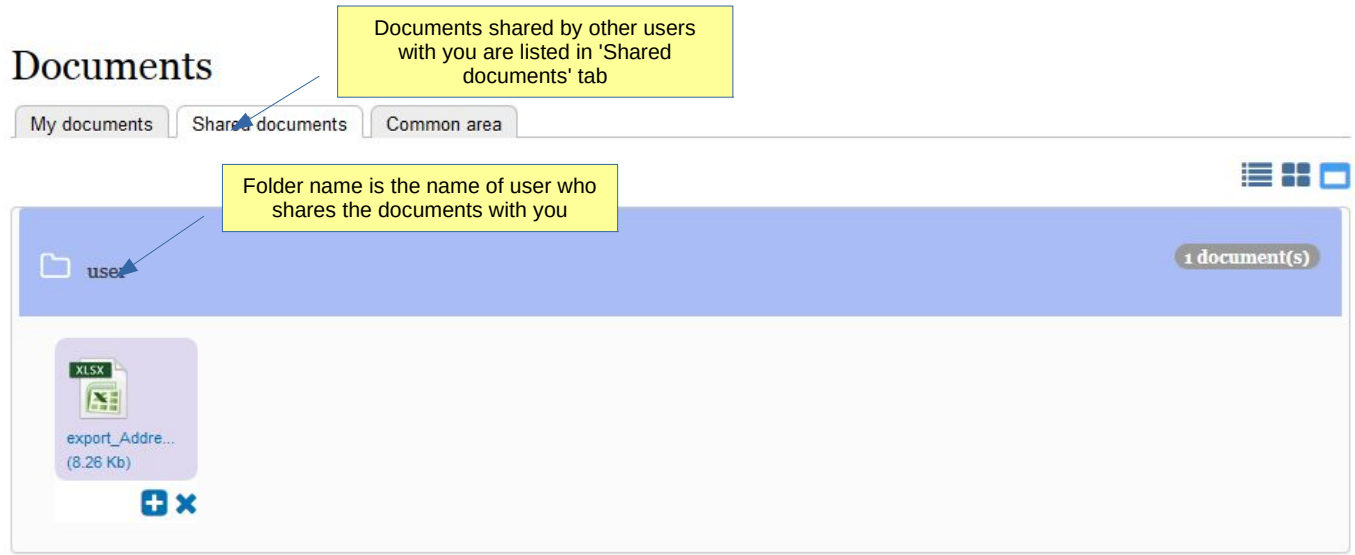
Documents

Move document

Documents

My documents | Shared documents | Common area

Example of document moved from Shared to My Documents

📁 moved from share folder   3 document(s)

documents... (248.3 Kb)   shoes... (16.15 Kb)   marketing... (53.98 Kb)

The document can be now dragged to other folder, shared or posted

Documents

Common documents

This section can be used to share files with all system users withut 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)

JPG
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.

Upload form will indicate you are sharing file with everybody

Select file

Browse... No file selected.

tag or folder ○

Upload

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

Subject will be used as folder name

Attach 1 or more files to be saved in your documents

Draft proposal.pdf (24K)

EK document received   Inbox   x

Email confirmation receipt

Ubuntu <ubuntu@mydomain.com >
to me

File(s) saved: Draft proposal.pdf

My documents on the server

file

PDF

Draft_propos ...
(24.5 Kb)
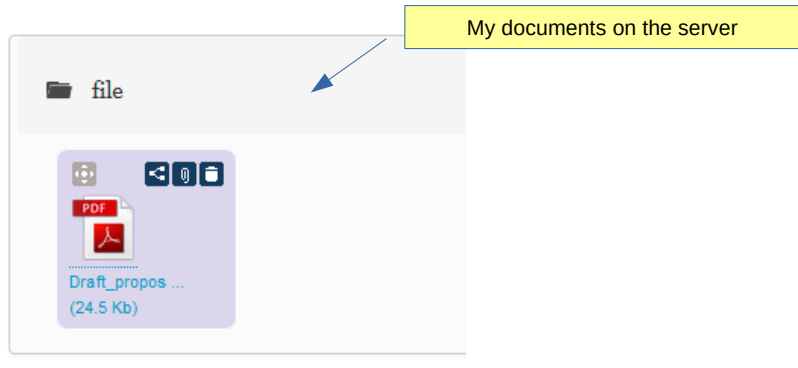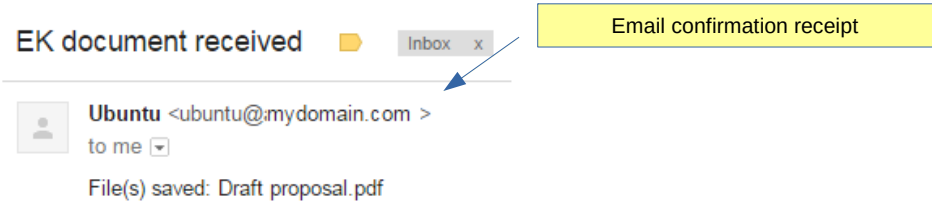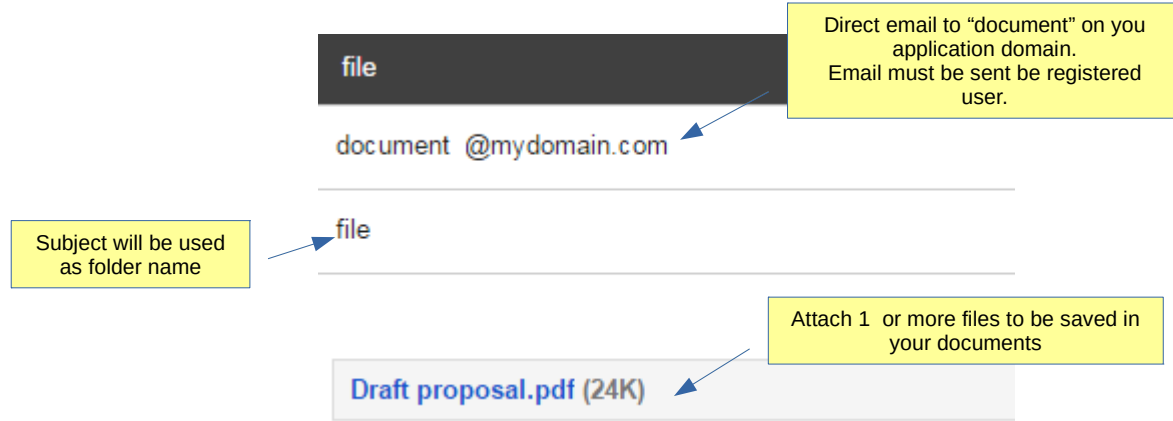
Documents

Settings let you configure some of the document module options

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

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