

Overview of documents module

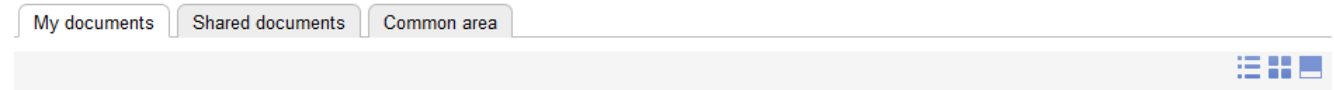
Documents

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



Upload document

Select file

No file selected.

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)

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

manual 1 document(s)

documents (248.3 Kb)

pictures 4 document(s)

drupal (13.8 Kb) marketing (54 Kb) excel (17.5 Kb) shoes (16.2 Kb)



Use this button to drag item to a different folder

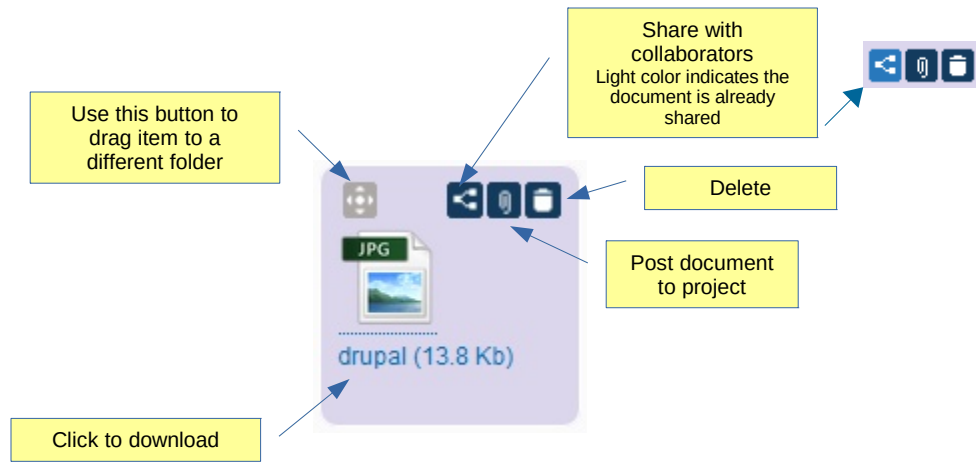
Share with collaborators
Light color indicates the document is already shared

Delete

Post document to project

Click to download

drupal (13.8 Kb)



Documents

My documents:

Filter

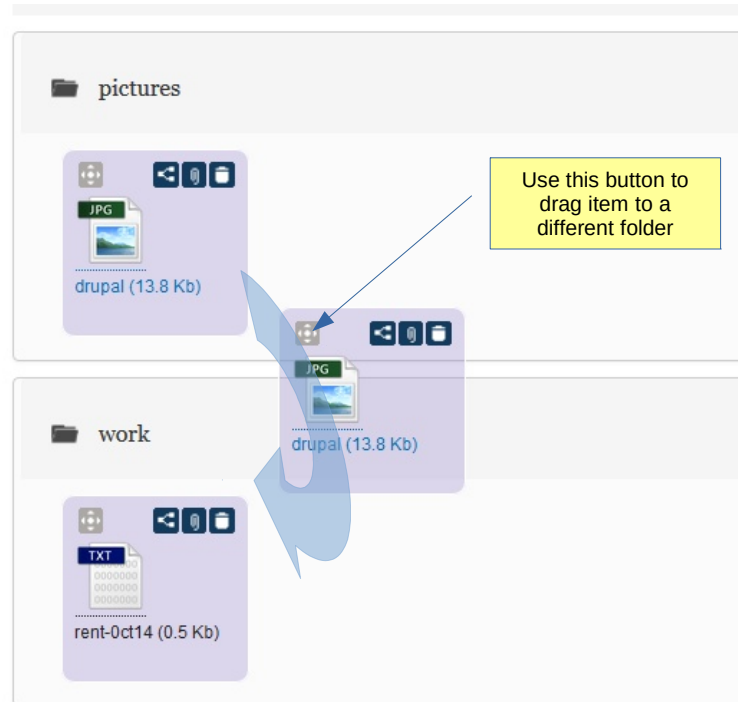
The image shows a 'Filter' dialog box with the following elements and callouts:

- 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

The image shows a 'share' dialog box with the following components and annotations:

- Share dialog form**: Two labels pointing to the top of the dialog box.
- Document: drupal.jpg**: The document being shared.
- not shared**: A list of users not currently sharing the document. The user **user** is selected.
- shared**: A list of users the document is currently shared with, including **user1**.
- Left colum: click on user to select for sharing document**: Points to the 'user' in the 'not shared' list.
- Right colum: shows users the document is shared with**: Points to the 'user1' in the 'shared' list.
- Select in left column users to share document with**: Instruction below the user lists.
- Check the box to notify users about the shared document**: Points to the checked for 'Send notification'.
- You can add a deadline for expiration of share action. After this date the document will not be accessible to users**: Points to the 'Optional expiration date' field.
- 2015-05-30**: The date entered in the expiration field.
- Optional expiration date**: Label for the date field.
- Share**: A button at the bottom right of the dialog.
- Click to confirm**: Points to the 'Share' button.

Documents

Post document to project

(See projects management module for further details)

The screenshot shows a web interface for posting a document to a project. The document is named 'drupal.jpg'. The 'Project' dropdown menu is open, showing options: '- Select -', 'action plan', 'communication' (highlighted), and 'finance'. The text area contains 'new logo for client'. A 'Post' button is at the bottom right. Annotations in yellow boxes with arrows point to the project selection dropdown, the 'communication' option, the text area, and the 'Post' button.


Annotations:

- Select a project in the list
- Select the project section
- Add optional comment
- Click 'Post' to attach the document to the project

Documents

Delete

The screenshot shows a web interface for managing documents. At the top, there are two tabs: "My documents" and "Shared documents". Below the tabs, there are two main sections. The first section is titled "pictures" and contains a table with the following data:

Document	Date
 drupal.jpg	30 JUL. 2015

The second section is titled "work" and contains a table with the following data:

Document	Date
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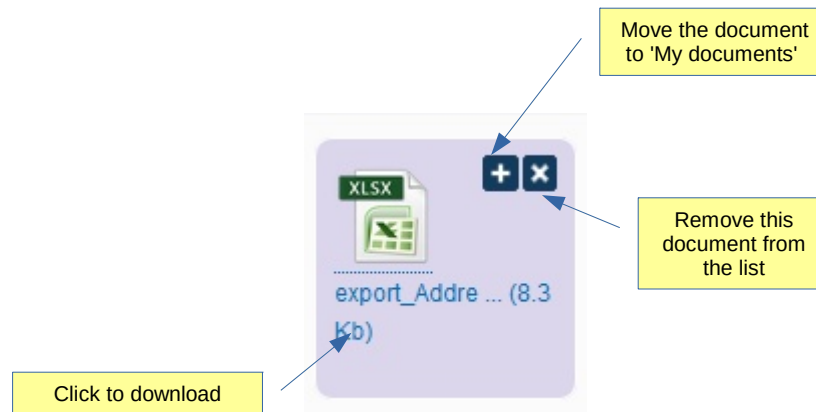
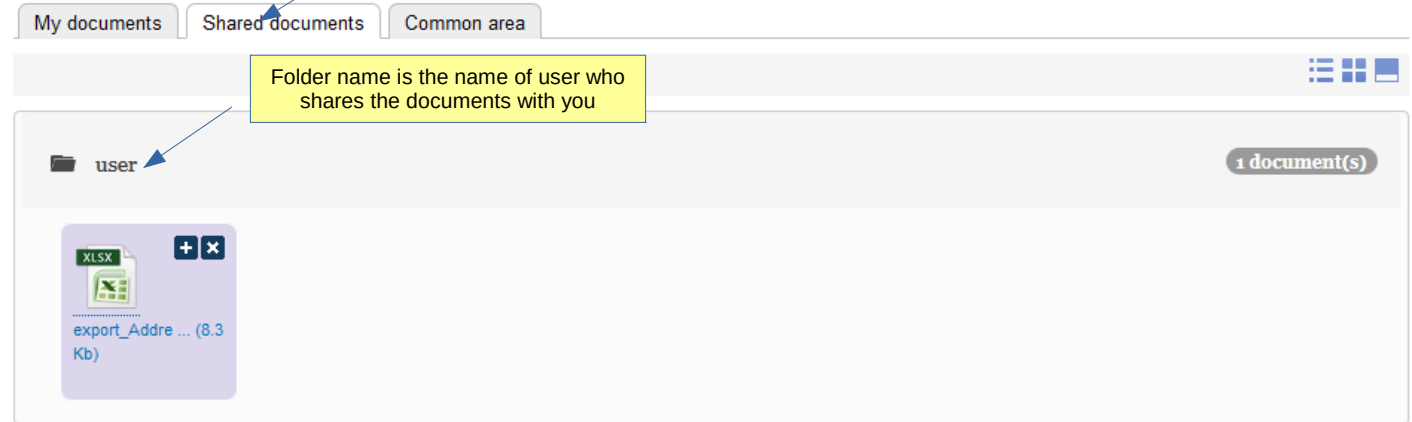
A confirmation dialog box is overlaid on the "pictures" section. The dialog has a title bar that says "Confirm" and a close button (X). The main content of the dialog is the text "delete drupal.jpg". A blue arrow points from a yellow callout box to the dialog. The callout box contains the following text:

When clicking on 'delete' a confirmation dialog will be displayed before deletion. Click on 'delete' again to confirm or 'X' to cancel.

Documents

Shared documents

Documents



Documents

Move document

Documents

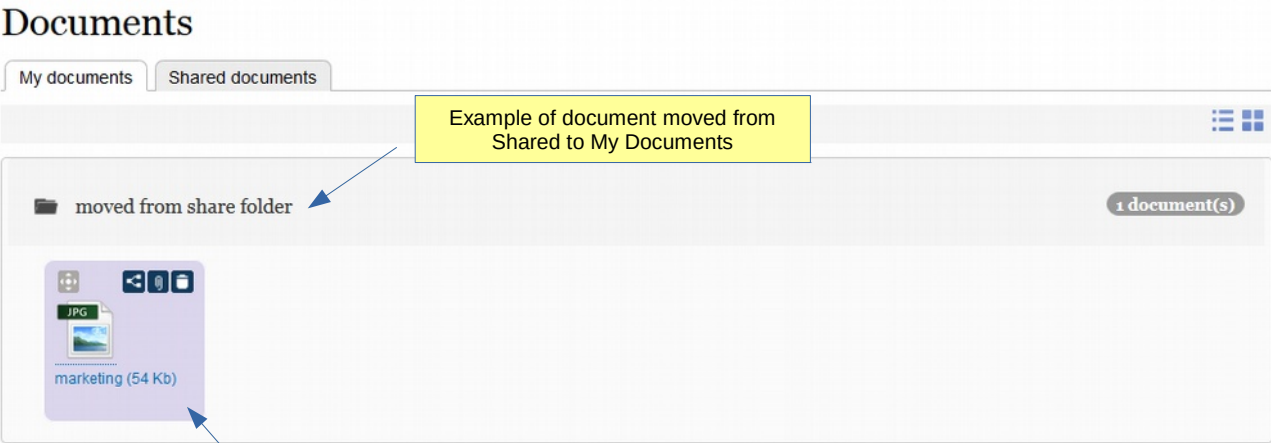
My documents | Shared documents

Example of document moved from Shared to My Documents

moved from share folder 1 document(s)

marketing (54 Kb)

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



The screenshot displays a document management interface. At the top, there are two tabs: 'My documents' and 'Shared documents'. Below the tabs, a folder named 'moved from share folder' is shown, containing one document named 'marketing (54 Kb)'. A yellow callout box points to the folder name, stating 'Example of document moved from Shared to My Documents'. Another yellow callout box points to the document icon, stating 'The document can be now dragged to other folder, shared or posted'. The document icon shows a preview of a landscape image and includes standard file management icons (share, refresh, delete) at the top.

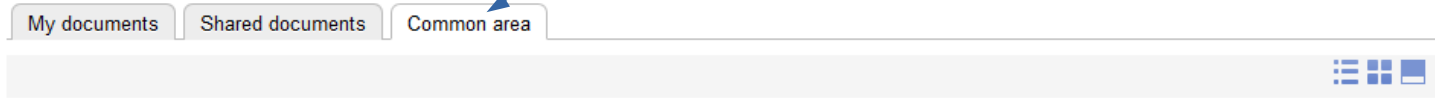
Documents

Common documents

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

Documents

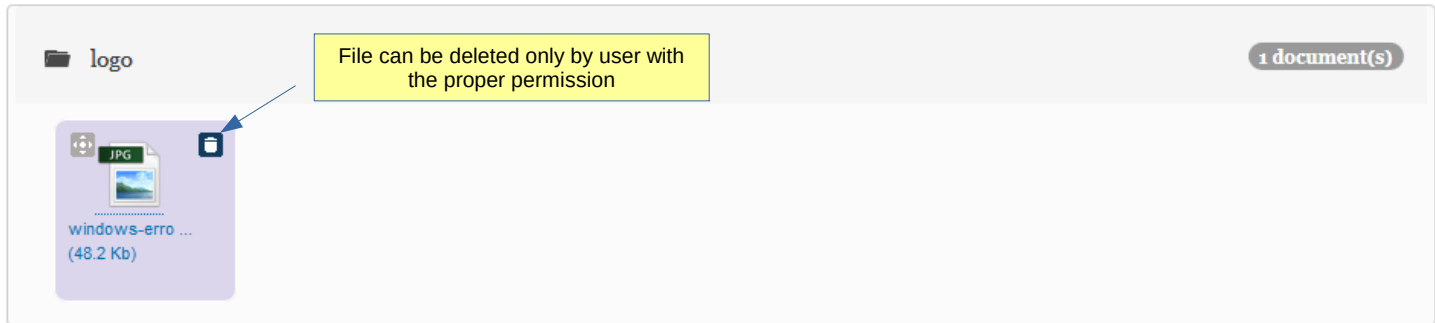
My documents | Shared documents | **Common area**



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)



File can be deleted only by user with the proper permission

Upload document

 File will be accessible in common area.

Select file

No file selected.

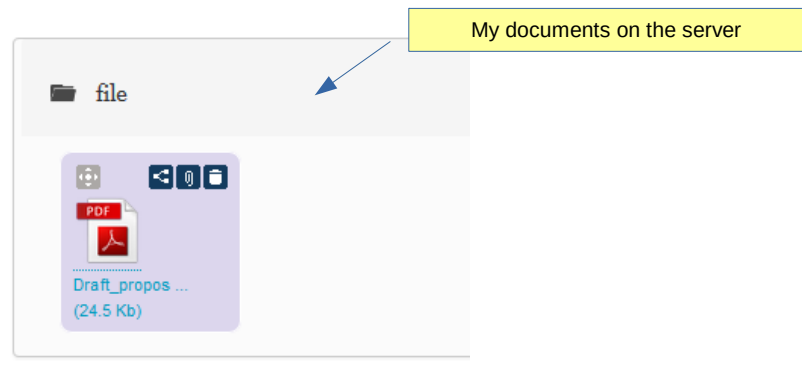
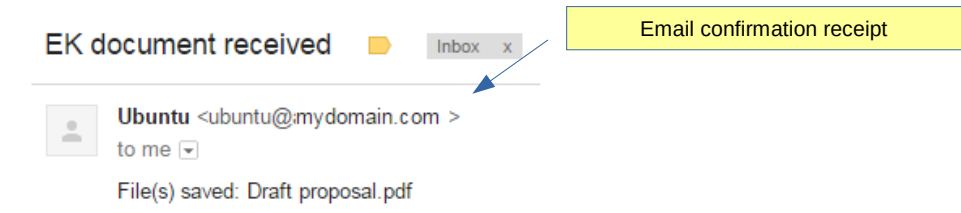
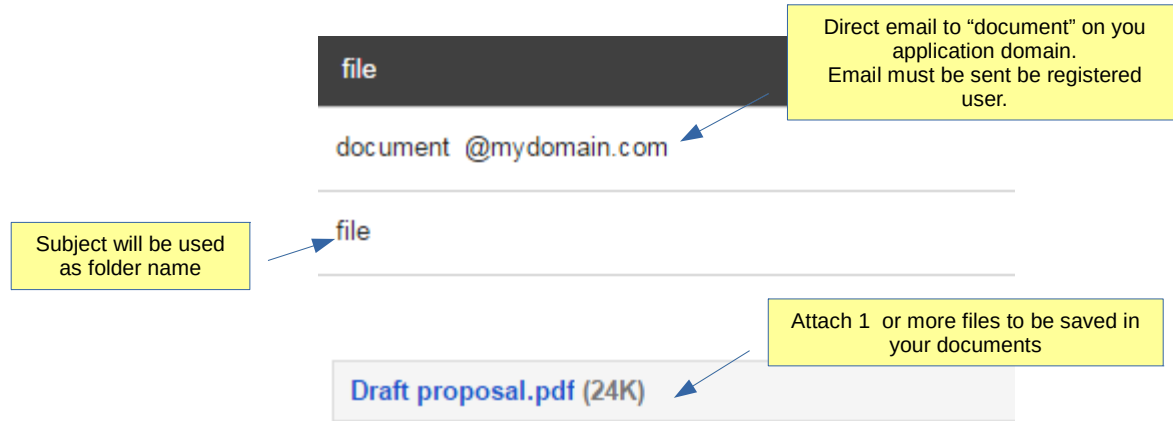
tag or folder

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





AREA
Systems

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