

How to Add Documents

Archived

How to add documents in the DMS

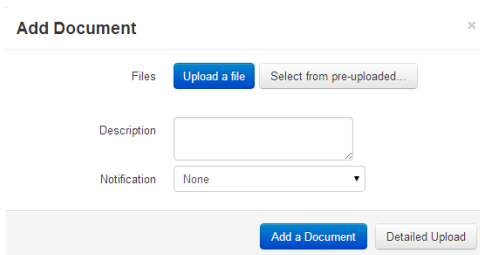
Introduction

Documents can be added to folders in both the front end Documents application, and the back end Documents Control Panel. This is of course dependent on if you have the appropriate permissions. It is recommended that documents are added in the front end.

Adding documents in the front end - Documents application

Go to Applications > Documents. Navigate to the folder that you wish to add a document to, and click Add Document.

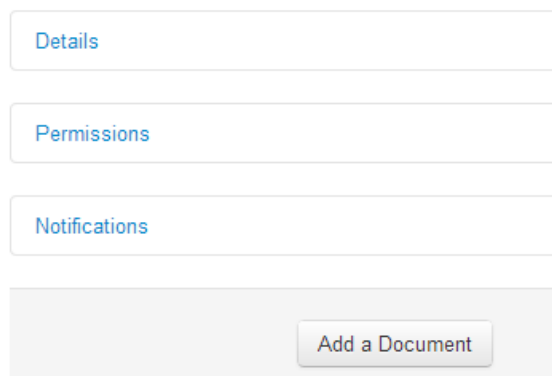
A pop-up will appear where you can click Upload A File to upload a document from your local drive, or you can drag and drop a file into the upload area (this will appear as you start dragging a document into the pop-up).



The screenshot shows a 'Add Document' pop-up window. At the top, there's a 'Files' section with two buttons: 'Upload a file' (highlighted in blue) and 'Select from pre-uploaded...'. Below this is a 'Description' text input field. Underneath the description is a 'Notification' dropdown menu currently set to 'None'. At the bottom of the form, there are two buttons: 'Add a Document' (highlighted in blue) and 'Detailed Upload'.

Clicking on Detailed Upload will take you to a page where you can enter additional information about the document, such as tags, metadata, and record type, as well as permissions and notification settings.

Add new Document



The screenshot shows a 'Add new Document' form. It has three tabs: 'Details' (highlighted in blue), 'Permissions', and 'Notifications'. Below the tabs is a large grey button labeled 'Add a Document'.

Once you have completed the relevant details, click Add A Document.

Adding documents in the back end - Document Control Panel

Whilst it is recommended that documents are added in the front end, it is possible for Administrators to add them via the Documents Control Panel.

Go to Applications > Admin > Documents. Navigate to the folder that you wish to add a document to, and click Add A Document.

In the Add A Document tab, click Upload A File, where you will be able to locate the relevant file from your local drive.

The screenshot shows the 'Add a document' tab with three sub-tabs: 'Add a document' (active), 'Metadata', and 'Edit permissions'. The 'Add a document' sub-tab contains the following fields and controls:

- Add to folder:** A text input field containing 'test' and a 'Change' button.
- Upload options:** A blue 'Upload a file' button and a 'Select from pre-uploaded...' button.
- Workflow:** A dropdown menu currently set to '-- None --'.
- Take responsibility:** A checked checkbox.
- Tags:** A text input field with a tag icon on the left.
- Popular tags:** A row of tags: 'HR', 'Finance', 'training', 'learning', and 'new name'.
- Submit:** An 'Add a document' button at the bottom.

In the Tags field, enter the required tags, separating each with a comma. Popular tags are displayed below, where you can simply click on those that you want associated to that document.

In the Metadata tab, enter the relevant details and select the appropriate record type (if applicable).

The screenshot shows the 'Metadata' tab with three sub-tabs: 'Add a document', 'Metadata' (active), and 'Edit permissions'. The 'Metadata' sub-tab contains the following fields and controls:

- Review Date:** A text input field with a calendar icon to its right.
- Description:** A large text area with an 'Inherit' checkbox to its right.
- Version comment:** A large text area.
- Record type(s):** A checkbox labeled 'User Guides'.
- Submit:** An 'Add a document' button at the bottom.

In the Edit Permissions tab, you will see that by default, the document inherits the permissions that were assigned to its parent folder.

You can change these permissions if needed.

[Add a document](#) [Metadata](#) [Edit permissions](#)


Permissions ☒ Inherit rights from parent folder

Start typing to add...

Browse Remove

Owner
Role: Intranet Administrators

☒ View
☒ Edit
☒ Move/delete
☒ Edit Metadata
☒ Edit permissions

 [View effective permissions](#)

Add a document

When you have completed the details, click Add A Document.

Last modified on 22 May 2019 by [Mhairi Hutton](#)

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Tags: [dms](#)