

# Uploading a Document

## How to add documents in the DMS

### Introduction

Documents can be added to folders from 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

Go to Applications > Documents.

- Navigate to the folder that you wish to add a document to, and click the green "Add Document" button.
- A pop-up will appear where you can click "Choose file" to select a document from your local drive, or you can select a pre existing file that has been uploaded to your site but not used anywhere yet.
- The fastest way to upload this document is to click "Add a document" from this pop up. It will then appear in your chosen location in the system.
  - Multiple documents can be uploaded at once, select multiple items from your computer and they will appear as separate documents in the pop up.

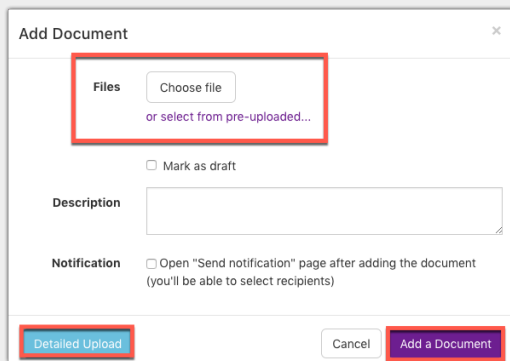
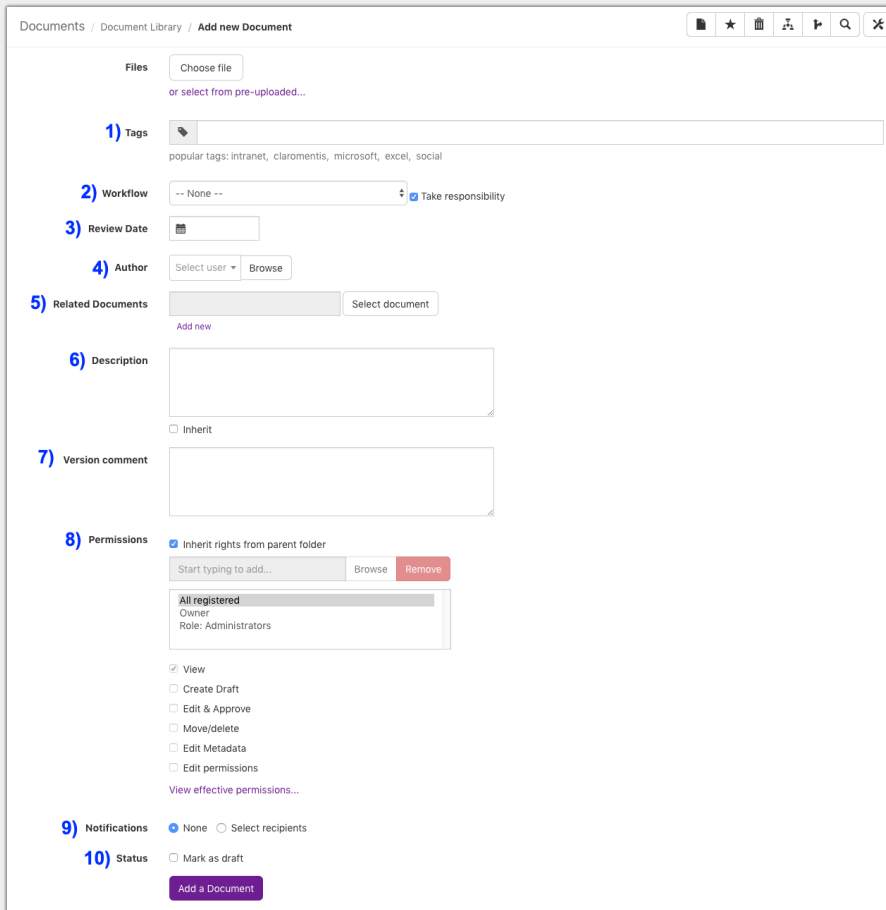


Image 1 - Initial pop up when adding document. Use the detailed upload button if appropriate.

However if required, you can input additional information about the document using the "Detailed Upload" button.

- This will take you to a page (Image 2) where you can enter additional information about the document such as tags, metadata, type, as well as assign permissions and change notification settings before uploading.
- (Explanations of terms in the detailed upload are at the end of this article)
- Regardless of which upload method you have chosen, once all relevant details have been inputted, click "Add a Document."
- Your file should now be in the system.



**Detailed upload screen breakdown:**

- 1) **Tags** - Add tags to group documents to act as a filter and make them searchable by key words.
- 2) **Workflow** - A feature that acts as an approval system for documents before being published.
- 3) **Review Date** - A notification will be sent to the owner of the document on the entered date to remind them to review/renew it.
- 4) **Author** - Enter name of person who wrote the document. This may differ to the person who is uploading it.
- 5) **Related Documents** - Can link to other documents in the system. They will appear on the right hand side when viewing any linked document for easy navigation.
- 6) **Description** - Add a short explanation of what the document contains or is to be used for.
- 7) **Version Comment** - If this was the 3rd version of a document, a comment here can let others know what has changed within the file compared to previous versions.
- 8) **Permissions** - Area to assign permissions to people,roles, groups. Ensure those who need to edit can do so.
- 9) **Notifications** - Upon uploading the document chose this option to send a notification to specified individuals to let them know the document is now accessible.
- 10) **Status** - If "Mark as draft" is checked only the owner and those with correct permissions will be able to see the uploaded file as it has not been made live. Whilst in draft the document is hidden from all end users, until the draft has been approved, where it can then be accessed from the system.

**Adding documents in the back end**

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.
- On the right hand side click "Manage documents list".
- From the folder heirachy select the folder that you wish to add a document to, and click "Add a Document" button (shown in image 3).
- Now you will see the same pop up options shown in Image 2.
- Fill out all the details required and select "Add document" at the bottom to upload the file to the system.

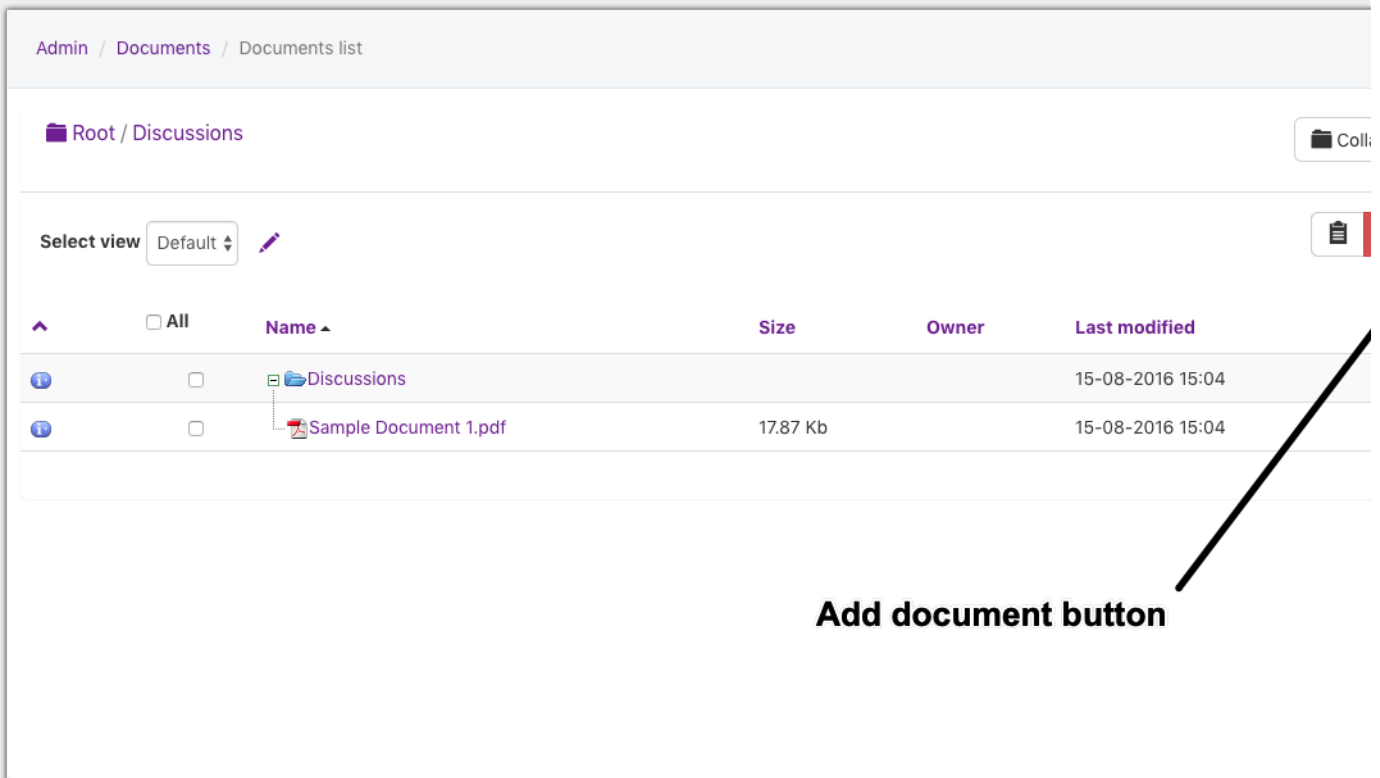


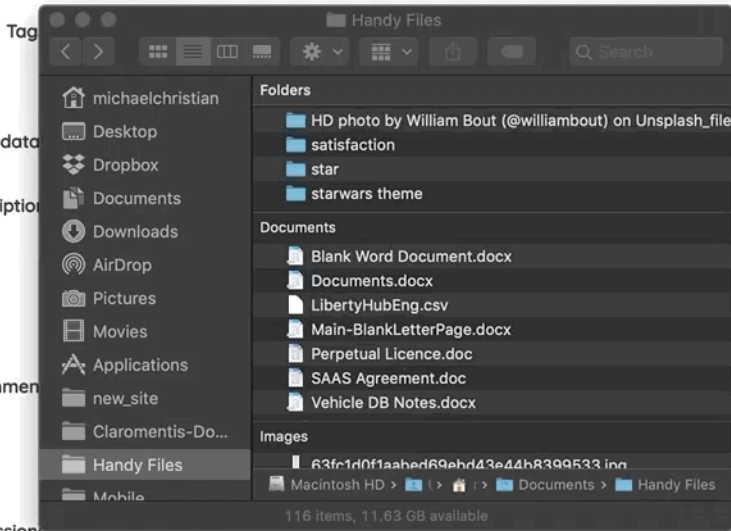
Image 3 - How to add document from Manage document list screen

**Useful tips**

**1. Multiple file upload**

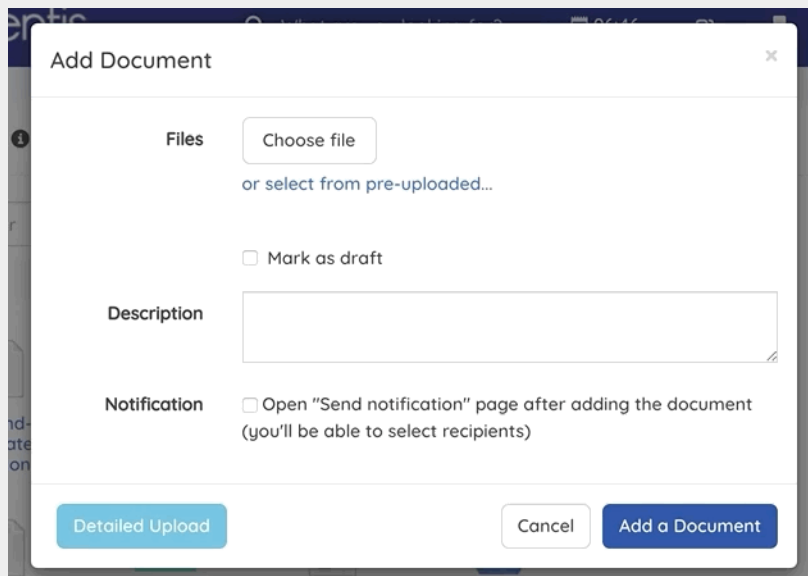
If you have several files that share the same metadata, it is possible to simply drag and drop multiple files into the upload field to have them uploaded in one go.

Files   
or select from pre-uploaded...



## 2. Uploading a zip file and then extract them

Alternatively, you can combine multiple files in a zip file, upload them and then choose extract zip to store them as individual files.



### Related Article

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