



Documents Front End (General)

Overview

The front end of Documents will be used by the majority of end-users.

Accessing the application they will be able to see all the folders, subfolders and files administrators have given them permissions for.

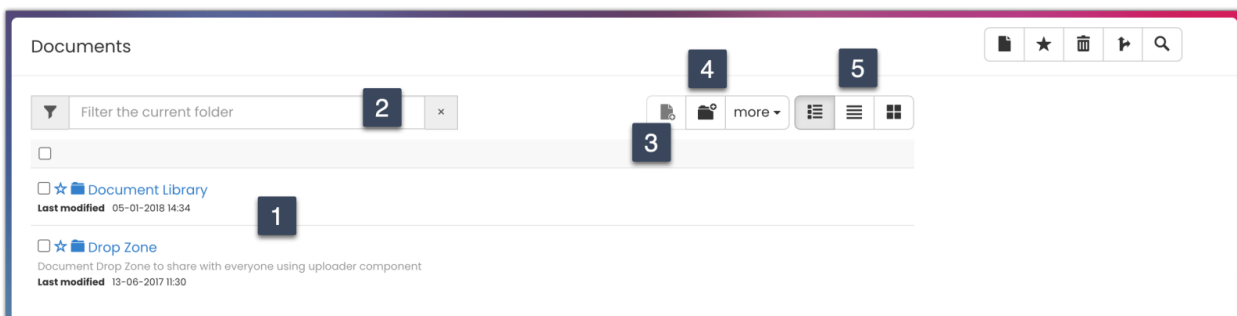
For information on the administrator view instead, check out this article here.

Applications > Documents

End users can follow this pathway to view the front end of Documents.

They will only see the folders and files listed that which they have been given permission for.

There are many options available to users, which are explained below.



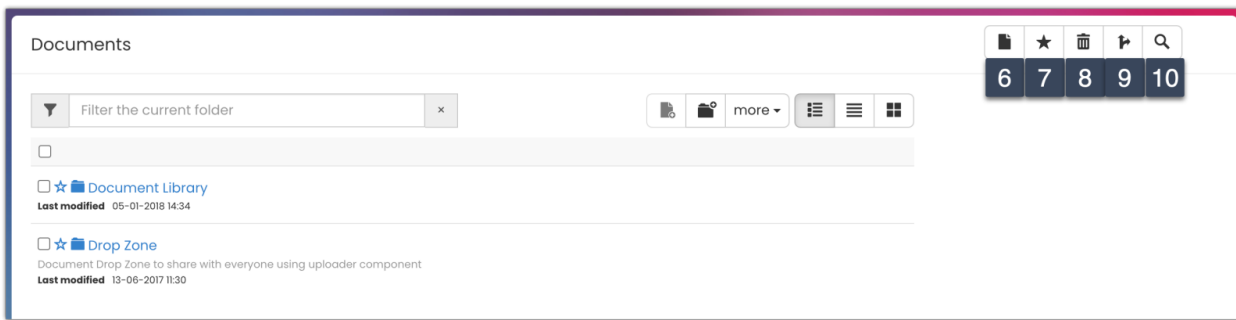
1. The list area that will display all folders and files a user can see

2. A filter for the current folder being looked at. Typing in search terms will refine results from that folder only.

3. Document upload button (will be greyed out if the user does not have permissions to upload to a folder)

4. Create New Folder Button (will be greyed out if the user does not have permissions to create a new folder)

5. Document view options - Set to 'List' view in this example but there is also 'Minimal list' and 'Thumbnail view'. Users can set this themselves depending on their visual preference



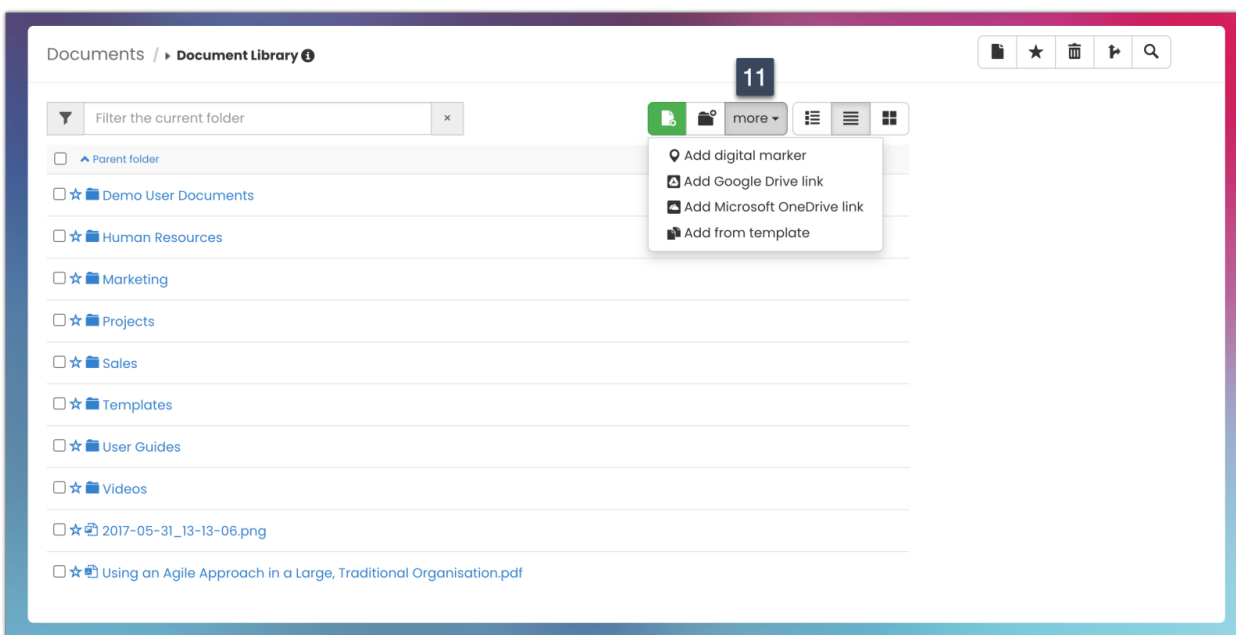
6. Document List - A shortcut to the root of the directory (useful when at other levels and need a quick return)

7. Favourites - Any folders or files that have been favoured by the user will be listed here. (the star icon next to content can be toggled to become favoured)

8. Trash Can - Any deleted content will stay in the trash can for 30 days and can be restored before this time frame elapsed, otherwise it is permanently removed.

9. Document Workflow shortcut - Users that are involved in any workflows set up will see this option. Read more about this here.

10. Advanced Search shortcut - Offers a host of parameters to facilitate a search of all documents.



11. 'More' dropdown - Offers different upload options which require extra configuration in order to work, see the guides below. (This section will be greyed out if a user does not have permission to carry out these actions)

- Add Digital Marker

- Add Google Drive Link

- Add Microsoft OneDrive link












- Add from template: Template document examples can be saved allowing this to be copied across into a new document upload

Making Changes

Based on the permissions they have been given a user may be able to add new files into folders or only browse and download those that are listed.

Folder icons and file icons indicate their type e.g. folder icon or file type.

 Filter the current folder 

-  Parent folder
-   Case Studies
-   Example Document.docx
-   Pages or Custom VI Version 9.mp4
-   Technical and Professional Services Brochure.pdf
-   Training Brochure.pdf

Check out the guides for steps on creating a folder or uploading a file.