Documents Front End (General)

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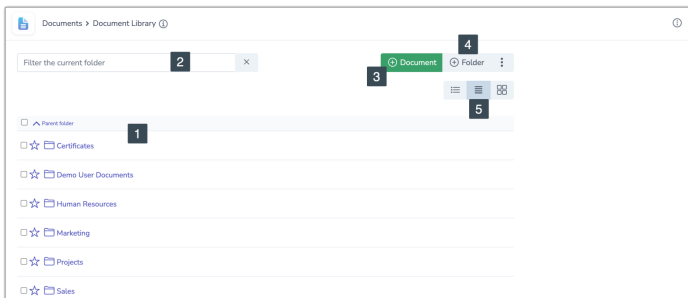
For information on the administrator view instead, check out this article here.

Applications > Documents

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

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

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 permission to upload to a folder)

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

5. Document view options - Set to 'Minimal List' view in this example but there is also 'List' and 'Thumbnail view'. Users can set this themselves depending on their visual preferences.
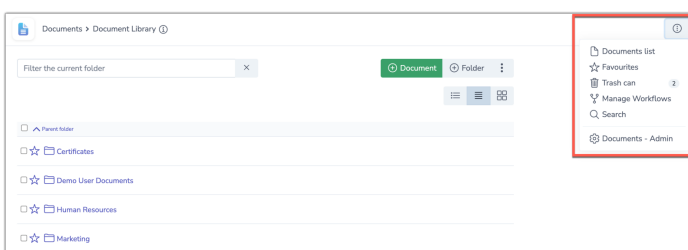
There are more options underneath the 3 dot button in the top right:

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

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

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. Users will only be able to delete folders and files they have the 'move & delete' permission for.

Manage workflows shortcut - Users who are involved in any workflows created will see this option. Read more about this here.

Advanced search shortcut - Offers a host of parameters to facilitate a search of all documents.
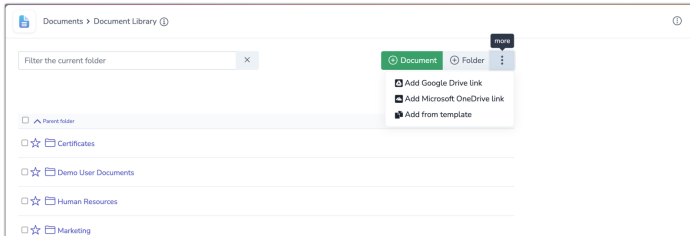
'More' dropdown - Offers different upload options which require extra configuration to work, see the guides below. (This section will be greyed out if a user does not have permission to carry out these actions)

- 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 across the directory a user may be able to add new files into folders or only browse and download those that are listed.

Clicking on files to open them will either generate a preview or automatically download to the user's device (no preview)

Folder and file icons indicate their type e.g. PDF, docx, PowerPoint, Image, Google or Onedrive (if configured)
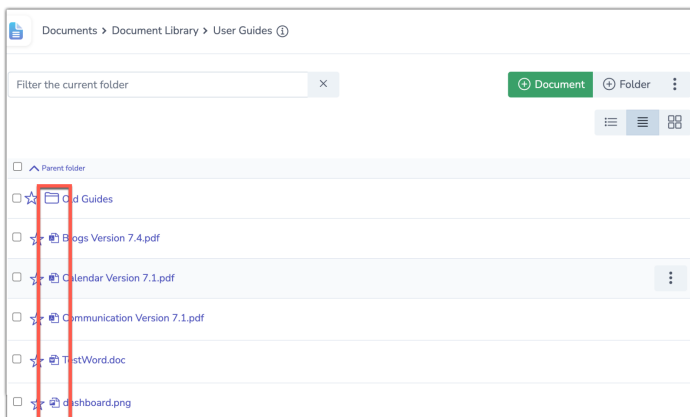
Document application administrators can assist with reported support or access issue in Documents from the admin side, while end users only ever access the front end and interact with content they have permission for.

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