



The “*Ecm Enhanced*” module extends the functionality of the standard “*Ecm*” module.

As in the standard module, It permits upload of the manual documents, but, in addition, these documents can be classified in category and associated with one or more tags.

Every automatic document (orders, invoices, ...), as created, is stored in the database and properly classified.

A powerful search engine, which allows queries on the database of documents, and the ability to perform massive operations, complete the functionality of the module.


## Installing and configuring

The “*Ecm Enhanced*” module installation follows Dolibarr the standard practice:

- Download the package.
- Move the file into the root of the Dolibarr directory (<yourlocalhost>/dolibarr/htdocs).
- Extract the package.
- Go to your Dolibarr web interface and log in as an administrative user.
- Click *Setup*.
- Click *Modules*.
- Locate the module you just downloaded, is under the *Interface Module* tab and click the Enable/Disable slider so the module is enabled.

Now, a simple operation, allows to import in the database all the pre-existing automatic documents (invoices, orders, ...).

To do this:

- click the module setup icon 
- in the following form click the *[Import]* button

Parameter

Import from existing automatic documents

Import

## Dictionaries

Two new tables comes with this modules and are accessible through the *Dictionary* page. These are:

**ECM Categories** Categories identify the families on which subdivide the documents.  
Each document belongs to a single category.


**ECM Tags** Tags are attributes associated to the single document.  
More than one tag can be associated to a single document.



It's a good practice to fill these tables just before starting to work with the module.

## Uploading a document

To upload a file:

- select the *Upload* tab
  - select the *Category* of the document
  - set, if needed, the *Third party* and the *Date*
  - insert, if needed, one or more tags associated to the document
- The  button can be used to add a new drop-down list in order to set more than one tag
- in the lower part of the form select the file to upload and click the *[Send]* button

The screenshot shows the 'Enhanced Document Area - Send file' interface. The 'Upload' tab is selected. The form contains the following fields and buttons:

- Send file** (header)
- Tag/category**: A dropdown menu with 'Altra prova' selected.
- Third party**: A dropdown menu.
- Date**: A text input field with a 'Now' button.
- Tags**: A text input field with a '+' button.
- Sfoglia...**: A button to select a file.
- Nessun file selezionato.**: A message indicating no file is selected.
- Send file**: A button to upload the file.

Red annotations highlight the 'Document information' fields (Tag/category, Third party, Date, Tags) and the 'Send form' button (Sfoglia...).

## Finding documents

The research of documents having particular characteristics can be done in the following way:

- select the *Search* tab



## Organizzazione Progetti Gestionali

- use the left panel to set the search parameters  
In this panel, the **+** button can be used to extend the research to documents that hold one of the selected tags (or condition)
- click the *Search* button
- in the right panel, as in the below image, will be show all the documents matching the selected parameters
- A series of operations will be possible from this panel :

The screenshot shows the Dolibarr 'Enhanced Document Area - Filemanager' interface. The left sidebar contains search filters for 'Tag/category', 'Third party', 'Date start period', 'Date end period', and 'Document Name'. The main area displays a table of documents with columns: 'Linked files', 'Tag/category', 'Date', 'Third party', 'Creation date', 'User', 'Last modified date', and 'User'. Red annotations highlight specific features: 'Mass operations' (top right), 'Research panel' (left sidebar), 'Results section' (main table area), 'Document operations: - modification - cancellation' (bottom right), and 'Multiple selection' (bottom right).


- sorting of the columns according to the standards of Dolibarr
  - single document download
  - vision of information associated with the document:
  - link to the object (order, invoice, ...) that generated the document (only for automatic documents)
  - single document cancellation
  - modification of document data (see the following chapter)
- a series of operations will eventually be possible on groups of previously selected documents
    - download (a zip file will be generated containing all the documents)
    - sending the attached documents to an email.The related parameters can be set from the setup window (as described below)
    - compression and storage of documents in a zip file
    - massive cancellation

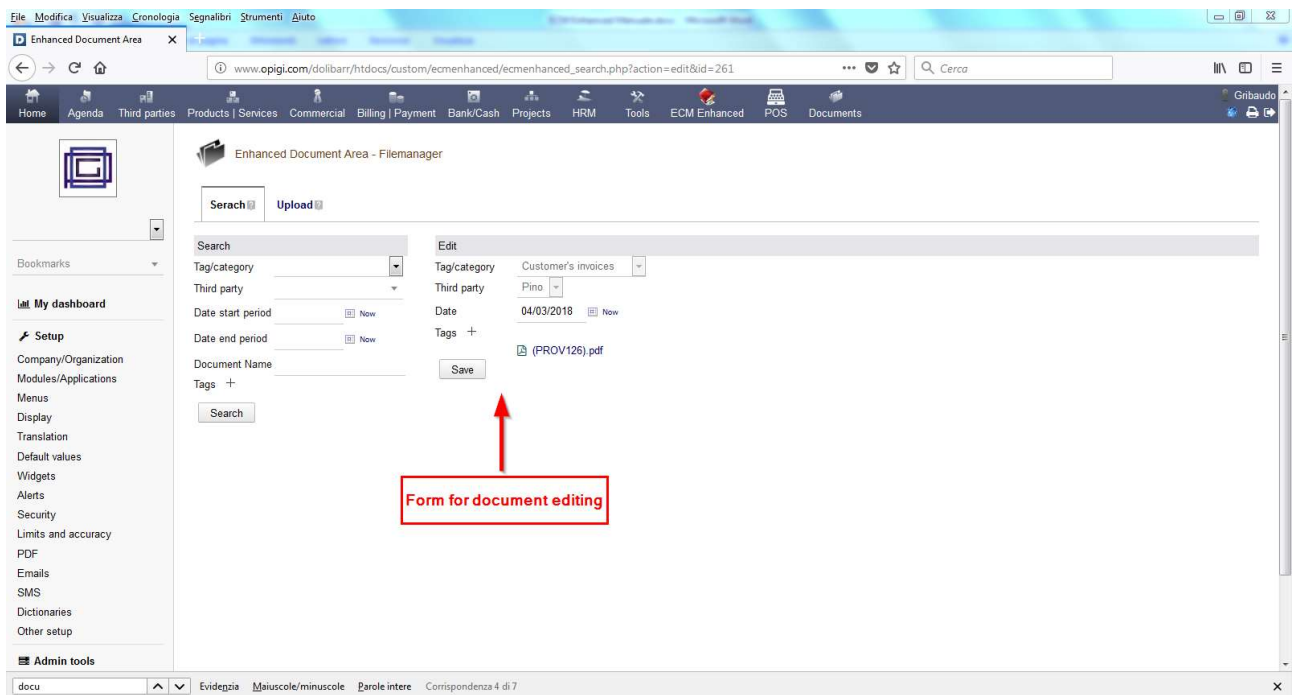


## Editing the document data

This form allow the data editing for the selected document.

In detail:

- *Category* and *Third party* can be edited only for manuals document
- A tag can be deleted leaving empty the corresponding drop-down list
- A tag can be added with the  button



The screenshot shows the 'Enhanced Document Area - Filemanager' interface. The left sidebar contains navigation links: Home, Agenda, Third parties, Products, Services, Commercial, Billing, Payment, Bank/Cash, Projects, HRM, Tools, ECM Enhanced, POS, and Documents. Below these are sections for 'My dashboard', 'Setup' (Company/Organization, Modules/Applications, Menus, Display, Translation, Default values, Widgets, Alerts, Security, Limits and accuracy, PDF, Emails, SMS, Dictionaries, Other setup), and 'Admin tools'. The main content area has tabs for 'Search' and 'Upload'. The 'Search' tab is active, showing a search form with fields for Tag/category, Third party, Date start period, Date end period, Document Name, and Tags. The 'Edit' tab is also visible, showing a form for editing the document. A red arrow points to the 'Edit' form, which is highlighted with a red box and labeled 'Form for document editing'.



### Other operations

Another set of settings and operations can be performed from the Setup window.

In detail:

Viewing xxxxx documents of all entities

Enables/disables the viewing of documents for the current entity. If disabled, only documents of the entity will be visible, if enabled all documents will be accessible.

The principal entity will have access to all documents.

This selection is possible both for "automatic" documents (those created by Dolibarr), and for "manuals" ones, created by this module. Defines the category to which compressed files will be associated, created using the bulk compression function.

Zipped File Category Name

Mail Subject

Defines the subject of the email as generated by the massive operations.

Mail Body

Defines the body of the email as generated by the massive operations.

Importing from pre-existing automatic documents

Allows, as previously mentioned, the automatic cataloging of the automatic documents pre-existing to the installation of the module.

Cleaning of categories without documents

Allows the elimination of all categories for which there are no documents.