



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.

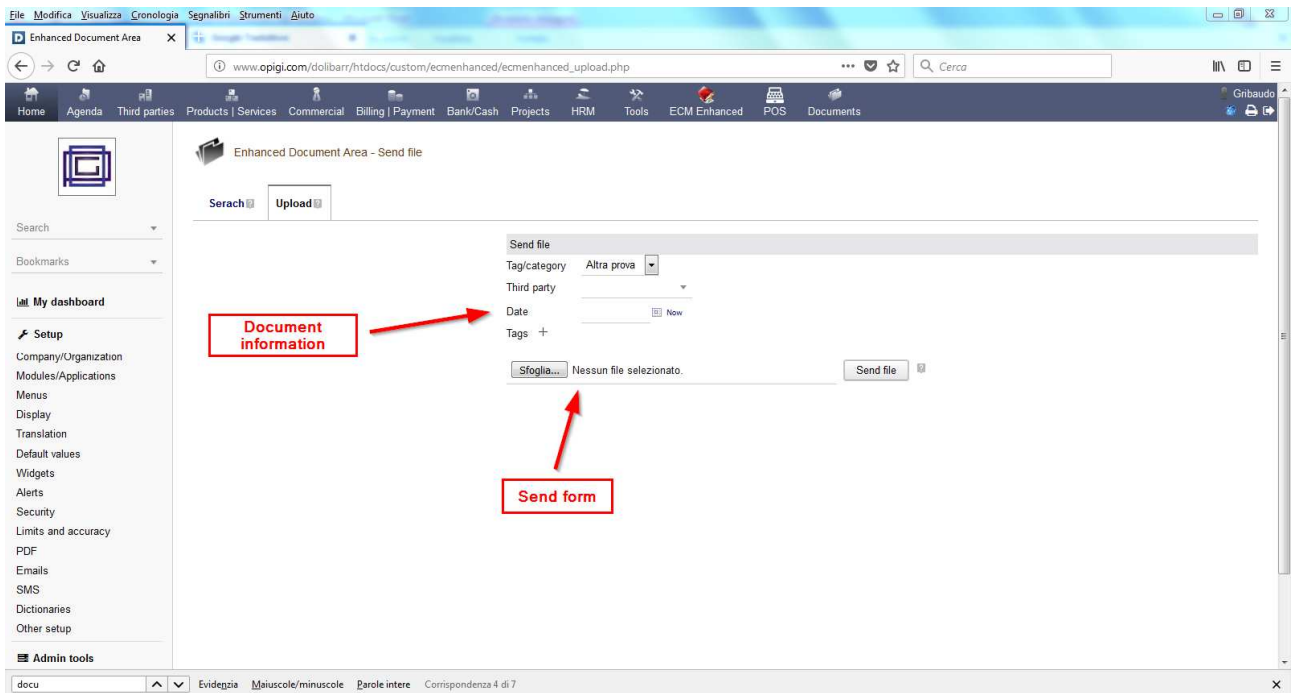


It's a good practice to fill these tables just before starting to work with the module.

## 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



## Finding documents

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

- select the *Search* tab
  - 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)



## Organizzazione Progetti Gestionali

- 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 displays the 'Enhanced Document Area - Filemanager' interface. On the left is a 'Search' panel with filters for 'Tag/category' (set to 'Customer's invoices'), 'Third party', 'Date start period', 'Date end period', and 'Document Name'. The main area shows a table of 'Linked files' with columns: Tag/category, Date, Third party, Creation date, User, Last modified date, and User. The table lists various PDF and ODT files. On the right, there are buttons for 'Send email', 'Download', 'Create Zip', and 'Delete'. A 'Mass operations' label points to these buttons. A 'Document operations: - modification - cancellation ...' label points to the checkboxes and icons in the table. A 'Multiple selection' label points to the checkboxes in the right-hand panel. A 'Results section' label points to the table itself. A 'Research panel' label points to the search filters.

- 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:



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- *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

Enhanced Document Area - Filemanager

Search Upload

Search

Tag/category

Third party

Date start period

Date end period

Document Name

Tags +

Edit

Tag/category: Customer's invoices

Third party: Pino

Date: 04/03/2018

Tags: (PROV126).pdf

Save

Search

Form for document editing

## Other operations

Enhanced Document Setup

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Setup

Parameter	Value
Zip file category name	Zip-Files
Email subject	Invio automatico di documenti
Email body	Salve, qui siamo

Other options

Parameter	Action
Import from existing automatic documents	Import
Cleaning of categories without documents	Purge



## **Organizzazione Progetti Gestionali**

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

In detail:

Zipped File Category Name	Defines the category to which compressed files will be associated, created using the bulk compression function
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