		Organizzazione Progetti Gestionali

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 identifiy 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)
- 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 :

- 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
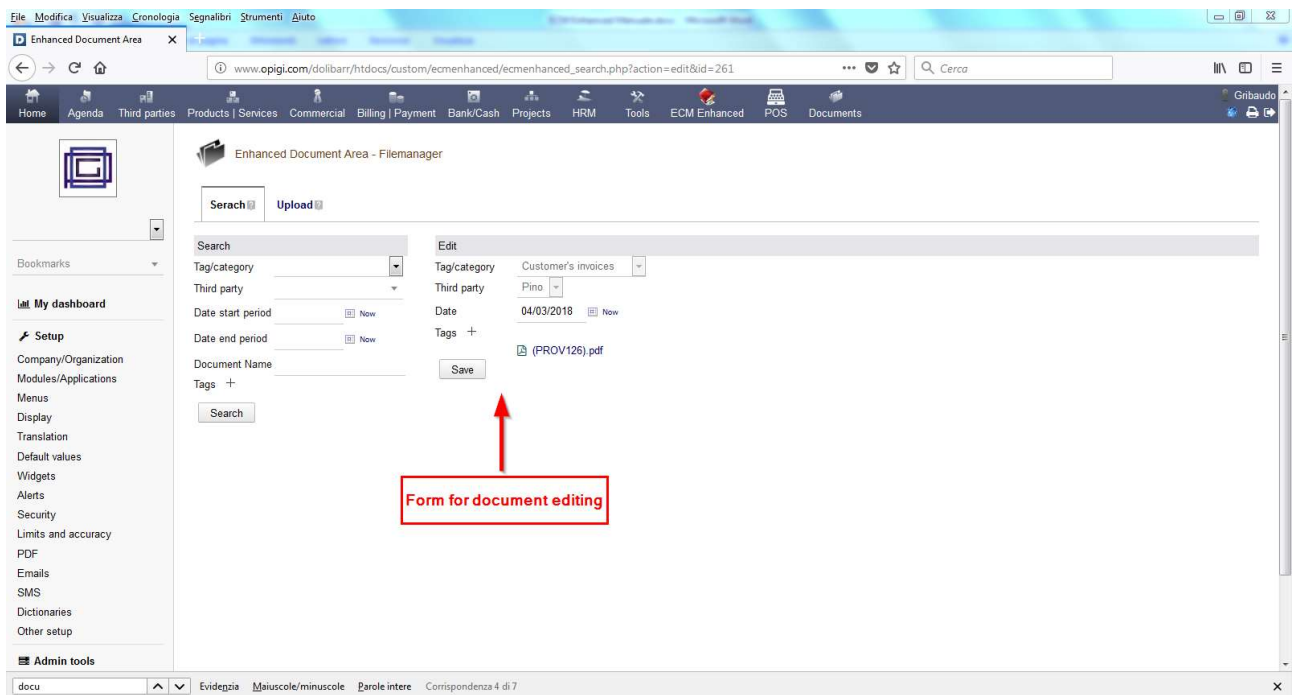 - massive cancellation

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

Form for document editing

		Organizzazione Progetti Gestionali

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
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