

# Open-DocumentLibrary v2.0 Owner's Manual



**Ajax Enabled, Easy, Powerful**  
smart document management has never been easier



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## Introduction

Open-DocumentLibrary (O-DL) allows DotNetNuke (DNN) users to manage and share documents in a flexible, intelligent way, offering granular control over Folder and Document access.

The module offers the possibility to organize documents by physical Folder and by logical Categories, thus making it easy for your users to look for and find documents according to areas of interest. Administrators can also choose among multiple display options.

All functionality is developed using Ajax, to maximize the responsiveness of the module. The administrator can Drag and Drop folders and categories, to change the structure and organization of the document hierarchy. By right clicking on the folders/categories, Administrators will be able to access all the advanced administrator features to administer the library and each folder/category and document. Thanks to Ajax, all functionality is available without having to refresh the browser page.

## Features

### Document Organization:

- Organize Documents by Folders. You can define Folders in a hierarchical way and as many levels deep as you like. The folders you create will be presented to the users in a way similar to the familiar Windows Explorer format and interface. You will associate a document to a folder, and decide what folders (and what documents inside those folders) a user and/or a user role can or cannot see.
- Organize Documents by Categories. You can define Categories in a hierarchical way and as many levels deep as you like. Presented as a tree structure to the user, categories can help you to organize your documents by different areas of interest. You can associate a document to as many categories you need, and decide what categories (and what documents inside those categories) a user role can or cannot see. By assigning a document to one or multiple categories, you upload your document once, but list it multiple times.

### Statistics:

- Keep track of folder, category and document access. You are able to see who is clicking on folders and categories as well as who is downloading the available documents. All statistics can be filtered by user profile and access dates, as well as other folder or category specific parameters.



## Display Options:

- Familiar Windows Explorer interface. By default Open-DocumentLibrary presents itself in a way similar to the familiar Windows Explorer interface. However, its context menus offer specialized and powerful options that allow the user with the appropriate rights to create, edit, delete, administer security and upload documents of every folder and/or category.
- Flat View. You may not always want to show a tree like navigation construct to access the documents. You will be able to display all documents contained in a folder (and all its sub-folders) at once, by selecting the appropriate options in the modules settings.
- Single Folder/Category View. By default, all folders in the library are displayed according to user view rights. However, you can decide to display a single folder that should be displayed (and all of its sub-folders), either through an option in the settings, or through a parameter in the URL. This allows you to link to the page where the library is located, from another page, and directs the user to only see those folders that you want them to see for a particular purpose. If you eliminate the parameter in the URL, the user will revert back to seeing all folders that he/she has view rights on.
- Private Folders/Categories [aka Direct Folder/Category Access] allows you to designate some folders as invisible unless accessed directly through a URL. These types of folders are subject to the same security restriction that you configure for all folders, except that they will not appear in the folder tree menu, unless you access them directly. In addition, you can further protect these folders/categories by requiring a password [aka Access Key] to be specified in the URL.
- Toggle between Folder and Category View. You have complete flexibility to give the user the option to browse documents according to Folder and/or Category classification.
- Documents in the library can be assigned a number of metadata information, such as description, size, name etc... The administrator has control over what metadata fields are actually displayed to the user, and can add or remove metadata from view.



## **Advanced Administration Interface:**

- Drag & Drop. Just like in Windows Explorer, you can drag & drop Folders around in order to change their place in the hierarchy. Thanks to the use of Ajax, these changes will be reflected immediately in your library.
- Context Menus are just a [right click] away. Access to all administrative functionality is granted through context menus that are available on every folder/category. According to the rights that the user has, the context menu can allow to: Add, Edit, Delete folders/categories, as well as Upload documents to it.
- Just [click] to see the contents of a folder. Just like in Windows Explorer, in order to see the documents contained in a folder, all you need to do is to click on it.

## **Administrative Granularity:**

- Administrative Granularity. Users with the appropriate access rights can assign a number of rights to Folders, Categories and Documents, that effectively grant or restrict all aspects of the access a user gets to a folder or the documents therein contained. View, Add, Edit, Delete and Change Security rights can be given on a folder/category, while View, and Edit rights can be granted on the documents contained in that folder.
- Access by User and by Role. A particular user will only see or be able to edit those folders or categories that he/she has been granted access to. These access rights can be granted to the user role or to a specific user in case of a Folder. Categories can be granted access rights at role level only.

## **File Management and Setup:**

- Folder Synchronization. You can opt to create your Document Library from scratch, or to create it from a pre-existing folder structure. Just point the library to the folder that contains all of your sub-folders and documents, and click the synchronize icon.
- UNC Share support. Folders can be created under the home directory of the portal (the same used by the DNN file manager) or another location on the hard disk, as well as a UNC share.
- File Security. All files can be protected from direct download. This is achieved by renaming all files contained in the library to an extension that is not directly accessible through a browser. The process is



transparent to the user and/or administrator.

- File Type Upload Restrictions. The administrator can decide what extensions to explicitly allow for upload. By default, all file types are allowed.
- Versioning. Versioning allows you to save versions of the documents and restore them on demand. Versioning is automatic when you upload files in the same folder and with the same name. You can also opt to create a version manually, or to turn versioning off.

### **Style Options:**

- The style (look and feel) of the control can be changed through Stylesheet Templates that can be selected through the settings. The module comes with pre-built templates, and more can be added easily.

## **General Notes**

- All styles can be changed through the module.css style sheet found in the module's specific directories.
- All text can be localized through the .resx files found in the App\_LocalResources directories in the module's specific directories



## Important Notes and Requirements

- There can be only one Open-DocumentLibrary module instance on a given page. This means of course that if you have 100 pages on your site you can have 100 instances of the module (one per page).
- If you have child portals, and you install Open-DocumentLibrary on a child portal, it will be considered as an entirely separate library.
- If you choose to secure the file system, it will mean that a user cannot access a document directly through a browser by simply placing the Url of the document in the address bar. The extension of the documents that are contained within the library will automatically be changed to .xsl.resx to prevent direct download of such documents. So, for example, a document named document.doc will be renamed to document.doc.xsl.resx. This change only affects the internal functioning of the module. The user will continue to see and manage the document as usual. Securing files is done through the module's global settings.
- By default ASP.NET limits the size of file uploads to 4MB. If you want to increase this size, you can override the defaults in the web.config file as in the example below:

**Note:** This is unusual, but worth noting: for large file uploads (100MB), it is important to note that the memory available to your WebServer's AppPool must be enough. If you notice troubles uploading large files, you should contact your hosting provider and verify that AppPool memory allocations are adequate.

### Example

Add an "httpRuntime" tag inside of the <system.web> area.

```
<configuration>
  <system.web>
    <httpRuntime maxRequestLength="102400" executionTimeout="3600"/>
  </system.web>
</configuration>
```

**maxRequestLength** = max files size (in Kilobytes) allowed for upload

**executionTimeout** = number of seconds allowed before asp.net kills the operation

in the example, we allowed 100 MB uploads (1024 Kb \* 100)



## Installation

### I have downloaded the Module package. Now what?

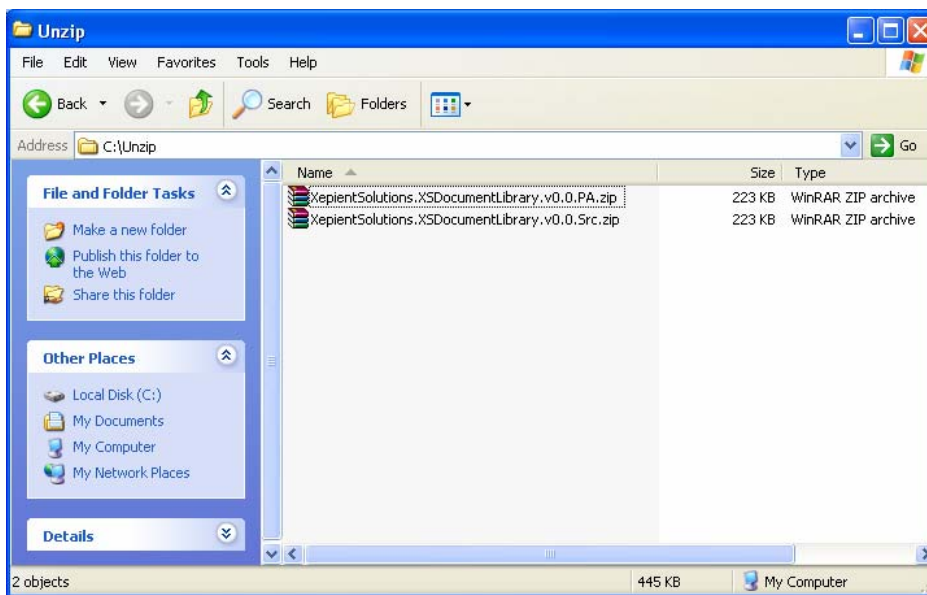
#### PA (Private Assembly) Version

If you purchase the PA version (the package that doesn't include the source code), the .zip download package will be named **XepientSolutions.XSDocumentLibrary.v0.0.PA.zip**, you can install it directly in your DNN installation. Please go to the "Install Open-DocumentLibrary" section below, for installation instructions.

#### Source Code Version (if available)

The .zip file you downloaded when you purchased Open-DocumentLibrary is not an installation package. Rather, it is a container of installation package and source code. For this reason, **the first step you will need to perform is to unzip the download package into a directory of your choosing**. We'll refer to the unzip directory as the "Unzip" directory.

The Unzip directory will contain two (2) .zip packages. All packages follow the same naming convention, where v0.0 will be replaced by the actual version number.





The packages are the following:

- **XepientSolutions.XSDocumentLibrary.v0.0.PA.zip**  
Contains the installation files of the module.
- **XepientSolutions.XSDocumentLibrary.v0.0.Src.zip**  
This package will contain the source code for the module.

## Note

Sometimes, a PA installation package may not be compatible with all DNN versions. In those cases, there must be different PA packages, depending on the DNN version compatibility. If that is so, the naming convention of the PA package would be slightly different, and it would contain the DN version it is compatible with.

As an example, if there were a PA package compatible with DNN3.x only and another compatible with DNN4.x only, you would see these two files:

XepientSolutions.XSDocumentLibrary.v0.0.DNN3.PA.zip

XepientSolutions.XSDocumentLibrary.v0.0.DNN4.PA.zip

## Install Open-DocumentLibrary

In order to install the package that contains the module, follow the instructions below:

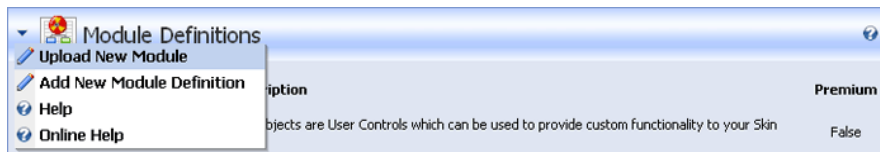
- **Login** into your website with the Host (SuperUser Account).
- Through the web site menu, navigate to the **“Host/Module Definitions”** section.



### Host Module Definitions

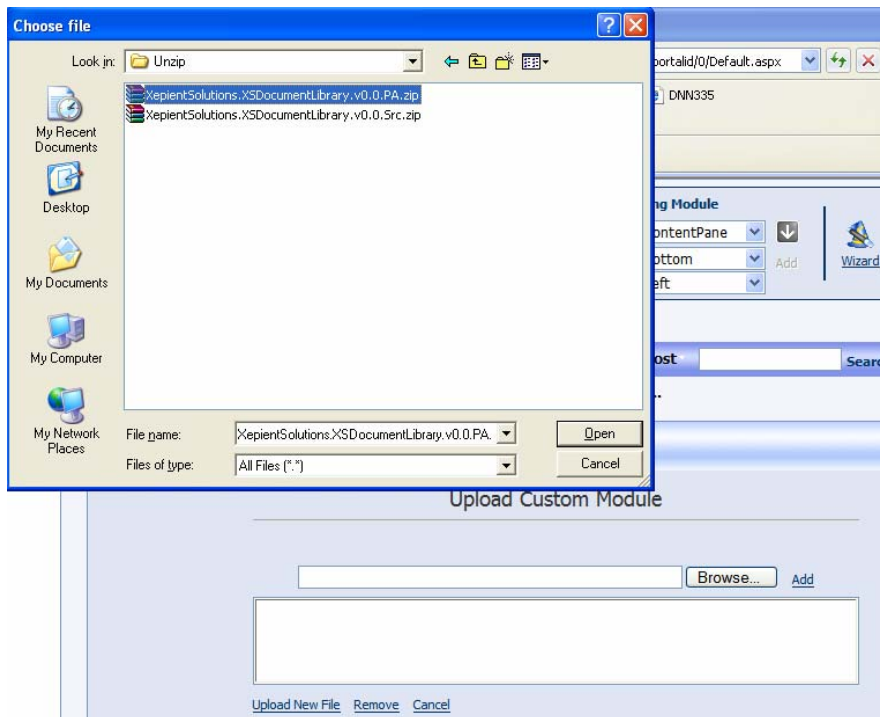


- Through the Module Definitions action menu, click on the **“Upload New Module”** option.



## Upload/Install New Module

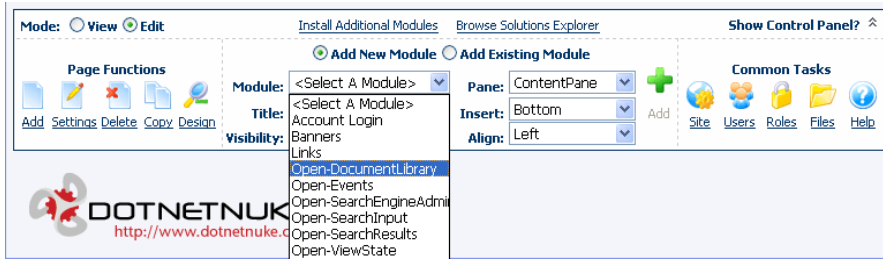
- Browse to the **“Unzip”** directory created in the first step, and select the **XepientSolutions.XSDocumentLibrary.v0.0.PA.zip\*** file. Once selected the appropriate file, click on the **“Add”** link next to the browse button, and finally click on the **“Upload New File”** link. The module will install itself, and you will see installation feedback in real time.



## Select the Package to Upload



- Upon module installation, you will see, in the Module selection dropdown, that the Open-DocumentLibrary module is available to be installed in a page:



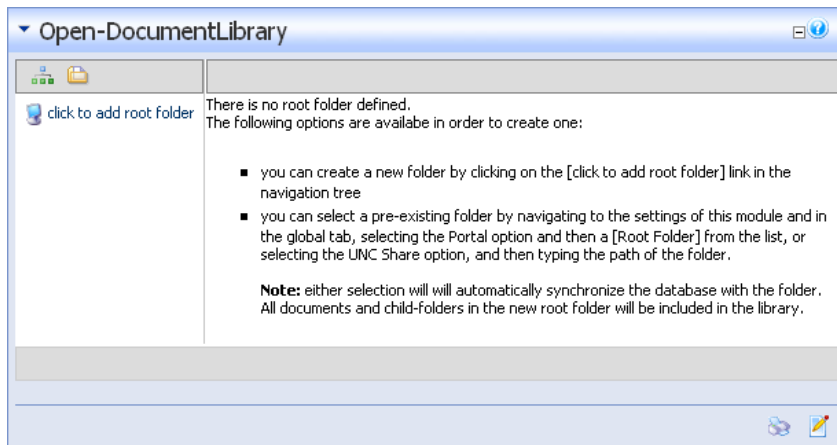
**Select the Module to Add to the Page**



## Insert Your First Document in the Library

After installing the module, we can create the library and insert the first document in it.

### Quick Administration and Configuration



[fig. q1] The very first time you drop the module on a page, you will see the module display the message as shown in fig. q1.

The message lets you know that a "root" folder (root file directory) needs to be either created, or selected, in order to start using the module. We'll explore the option of how to create or select a root folder

in detail in the following paragraphs.

#### Note

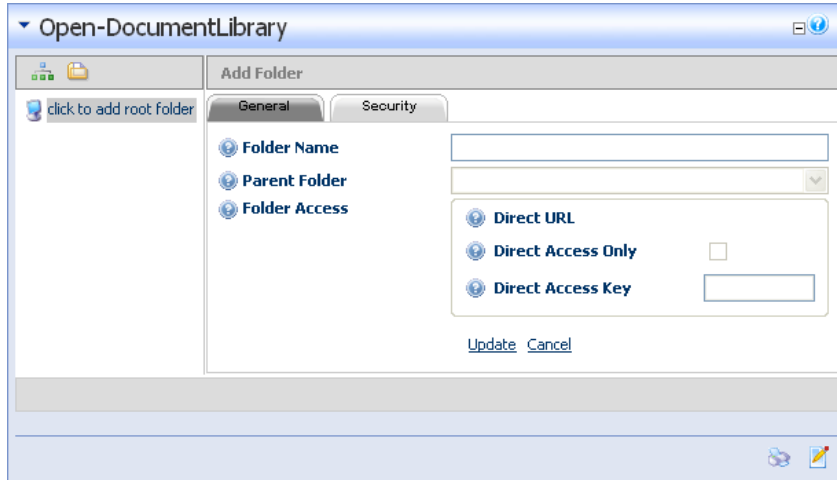
This version of Open-DocumentLibrary allows the "root" folder of the library to be of type Portal or type UNC Share.

**Type Portal:** When of type Portal, the root directory will be located under the "Default Directory" of your DNN portal or child portal. In a default portal DNN installation, the default directory would have the following route: <DNN virtual root>/Portals/0  
In a child portal (named child), the default directory would have the following route: <DNN virtual root>/Portals/child

**Type UNC Share:** support for UNC Shares is available through the Global Settings. You can basically point the library to any path local to your computer or to a UNC Share, as long as the ASP.NET/Network Services user has the appropriate read/write/change rights. for instructions, you should look at the section "Option 2: Import a Library".

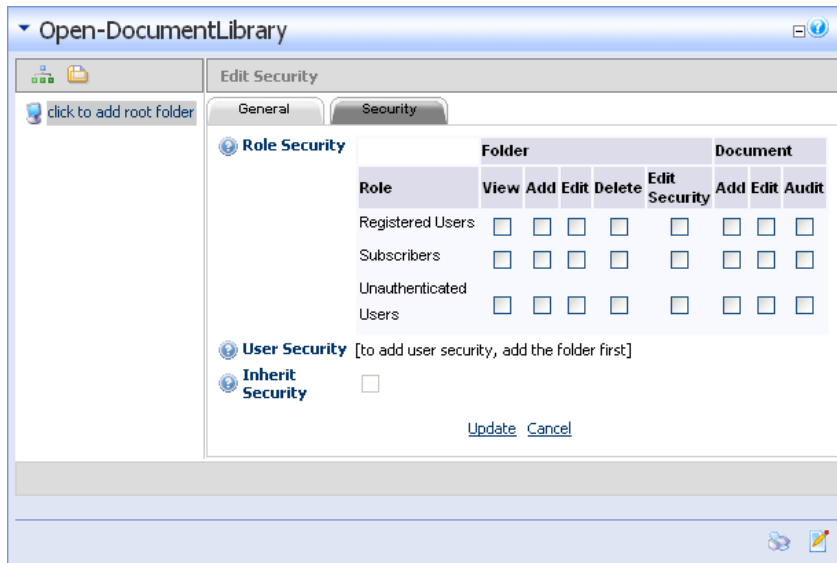


## Option 1: Create a Library from Scratch



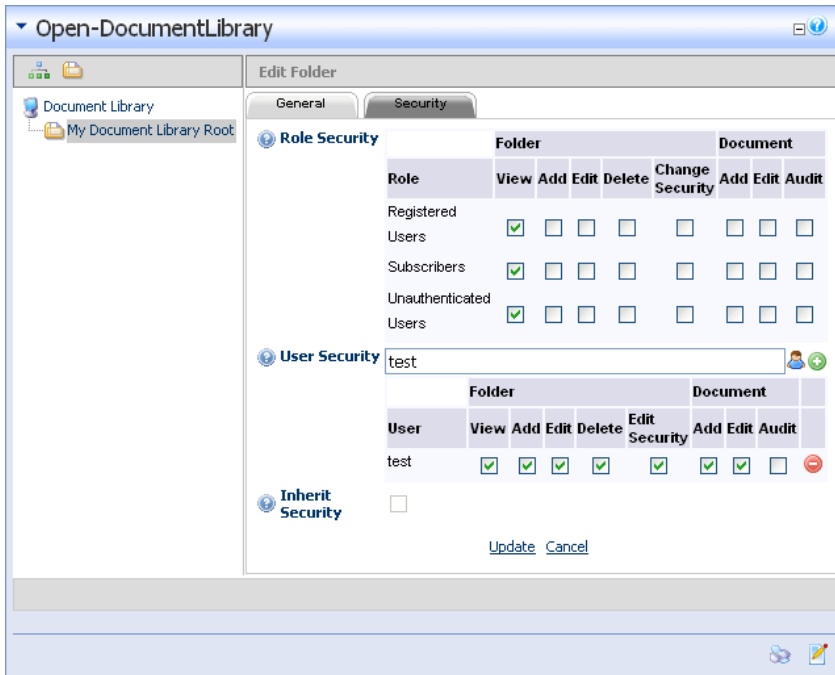
[fig. q2] If you want to create a root folder from scratch, and then add documents to it, just click on the link: "click to add root folder" in the navigation tree.

You will be brought to the "Add Folder" section, where you can insert the name of your root folder, as shown in fig. q2.



[fig. q3] You can then assign security access to the newly created folder by clicking on the "Security" tab of the "Add Folder" section. You will be presented with a series of security rights that can be granted to various roles, as shown in fig. q3.

In later sections we'll explore the details of such rights. For now, we'll just give Unauthenticated Users, view access.



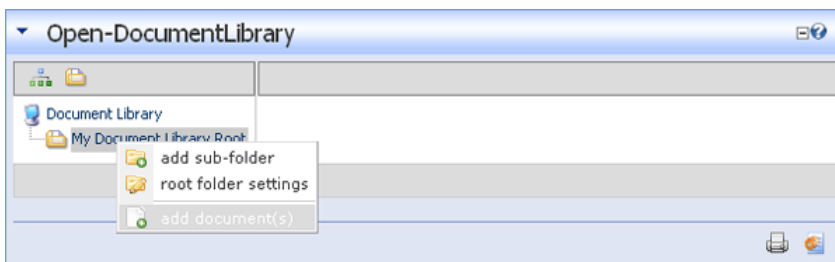
[fig. q3.b] You could also opt to give a specific user a specific set of access rights. As the message says, you will need to add the folder first, and then re-enter this setting in order to give the specific rights as shown if fig. q3.b

Clicking on update will create the root folder, and you'll be able to add documents to it.

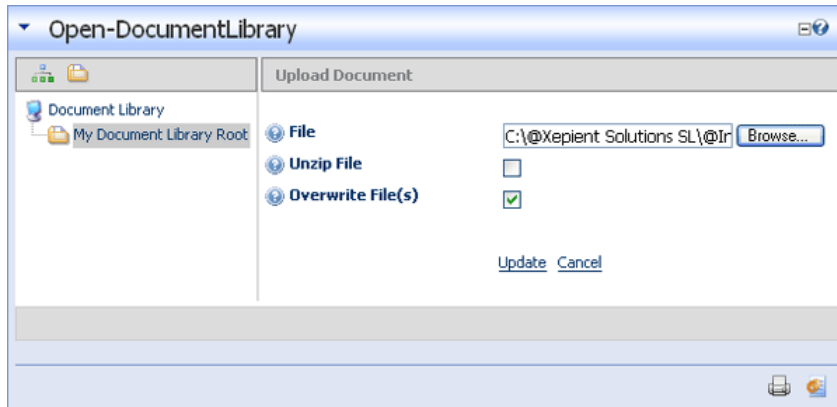
### Note

Notice that there is no Administrators role in the list of security Roles. This is because this role, as well as the SuperUser (Host) will always get full rights to the library.

To help you select the appropriate user, there is a user pop-up list from which to choose.



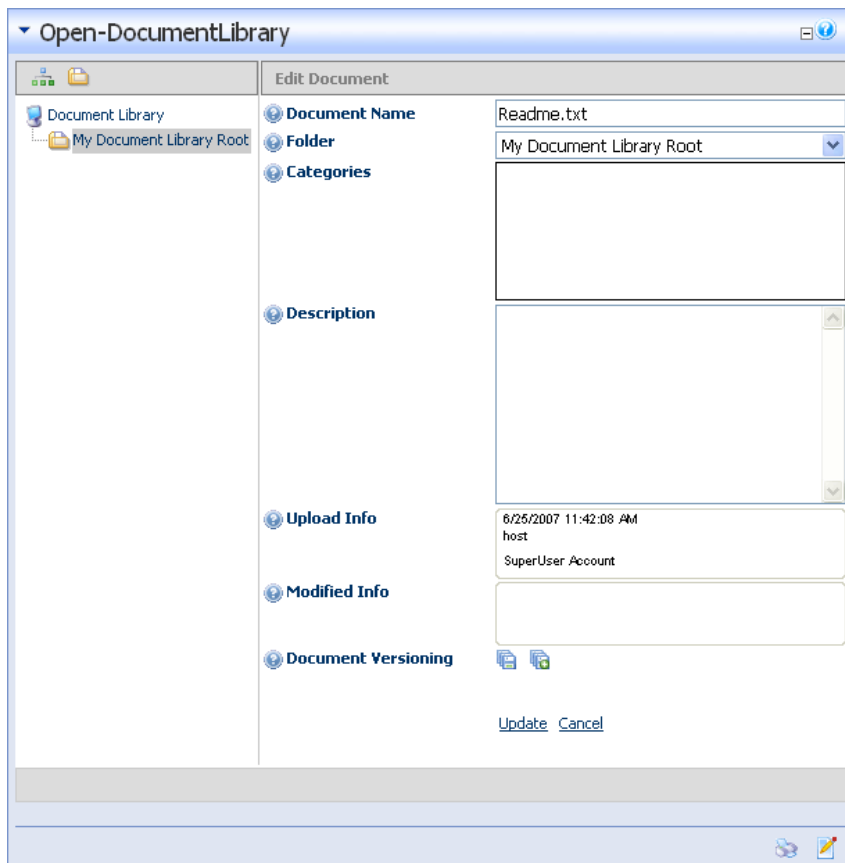
[fig. q4] Fig. q4 shows that in order to add a document to the library you can right-click on a destination folder, and then select the "add document(s)" option in the context menu.



your local file system a documents that you want to upload. Clicking on update will upload the file and save it on the server.

**Note:** that ASP.NET limits the size of file uploads to 4mb. The size of uploads can be increased by modifying the web.config file, as described in the "Important Notes and Requirements" section of this document.

[fig. q5] Once you select the "add documents(s)" option from the context menu, you'll begin a two step process. The first step will be to upload the file. The second will be to add metadata to the newly uploaded file. In Order to complete step one, you will be presented with the "Upload Document" section, where you'll be able to select from




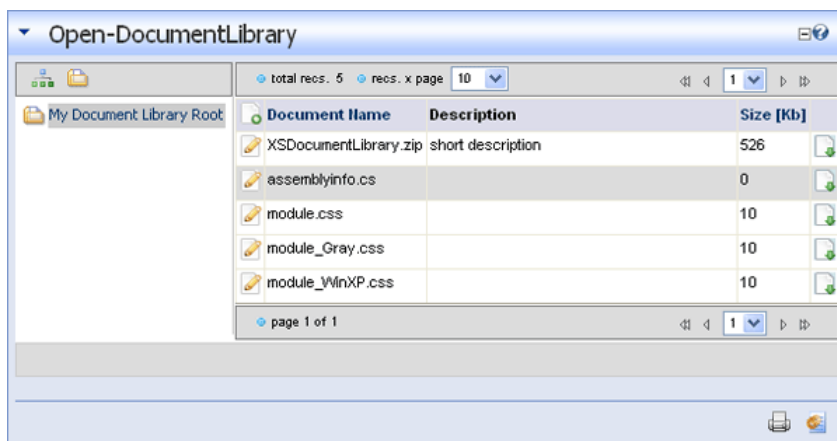
[fig. q6] The second step will present you with the "Edit Document" section, where you'll be able to add metadata such as description etc... to the Document you just uploaded.

You can add new metadata and click update, or if you just want to finish without adding any data, click cancel. You will immediately be brought to the list of documents for that folder.



## Note

You'll notice that in the "Edit Document" section, there is a "Categories" field that is blank. Had we created categories (they are created just like folders are), we would have also been able to associate them with the document. We'll talk more in-depth about categories in future sections, but for now, think of them as a way to organize your documents, offering an alternative organizational view of your documents. Like in a real library, a document can belong to a single folder (physical shelf), but it can belong to multiple categories. Categories are represented as a hierarchy tree, just like the folder tree, and can be seen by clicking the  icon in the toolbar at the top of the navigation tree.



[fig. q7] Once a document has been added, you will see it displayed in a list, such as the one shown in fig. q7.

By default the list will show four columns: Document name, Description, Size and a Download icon. You will be able to sort by Document Name and Size. Also, in the Settings of the module, you can

indicate what columns are to be shown and the initial default sort field and direction. All columns can be hidden, except for the Document Name one.

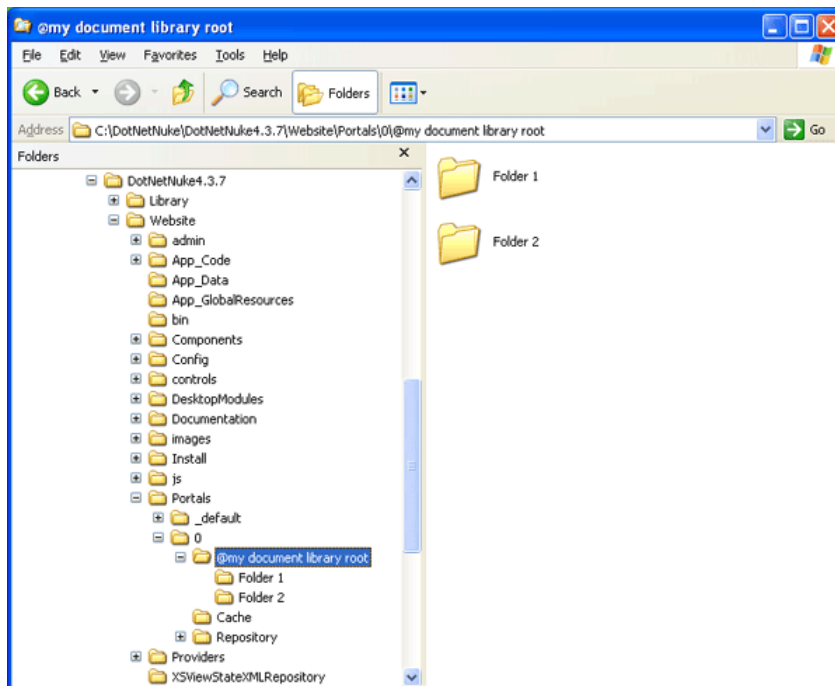


## Option 2: Import a Library

Under some scenarios, you may want to build your library starting from a pre-existing set of directories and documents. This option will allow you to do just that, and, automatically import both your directory/folder structure as well as the documents directly into the library.

### Note

You can also opt to secure your files before synchronizing. If you do secure your files, please note that the documents in your pre-existing structure will have an extension added to it: for example a document.doc will be renamed document.doc.xsdl.resx in order to prevent direct download. This change is transparent to the user, and the appropriate extension will be reinstated when the document is downloaded. More details are given in the "Module Detailed Help" section of this document.



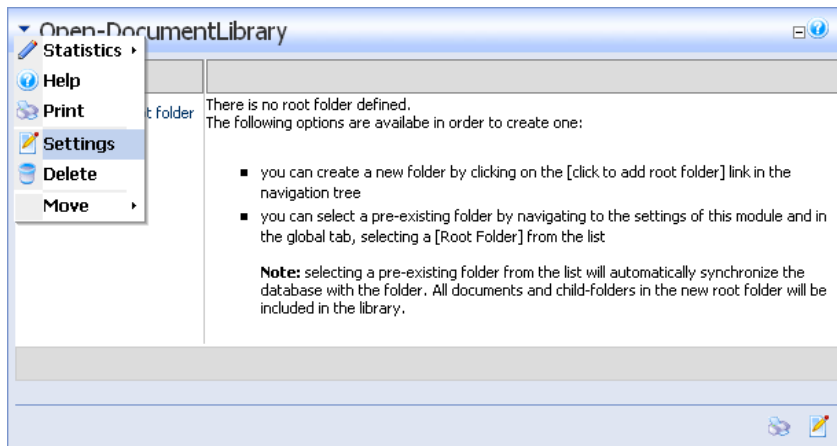
[fig. q8] To get started, you should copy or create your folder structure under the Home Directory of your portal, or, if you choose the UNC Share option, a UNC Share or a local folder. In a typical DNN installation, the default home directory is created under the "<dnn root>/Portals" directory. In fig. q8, you can see how we have created a directory named "@my document library root" under the "<dnn root>/Portals/0" directory which is the default directory (Home Directory) of any default dnn parent portal. Our newly created directory contains two additional folders:

Folder1 and Folder2, and each of those folders contain two documents. What we will do now is to import this folder structure and the documents it contains into our library.

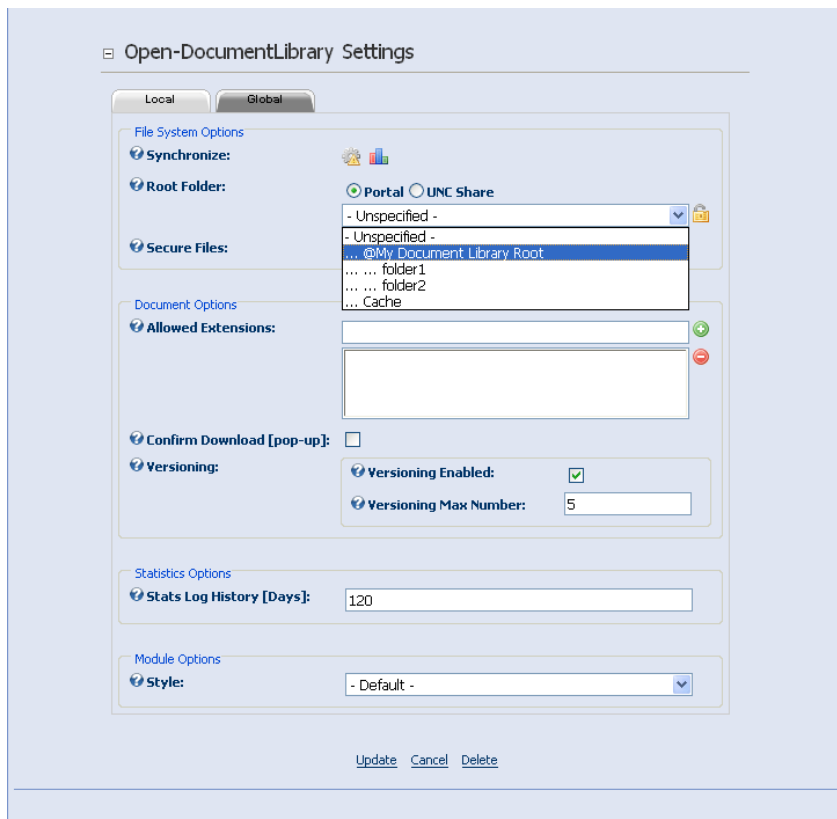


## Note1

Remember that in DNN, folders are required to grant read, write and modify permissions to the ASP.NET or Network Services user, depending on the operating system you are using. Your newly created folders will inherit these permissions from the parent folder you place them in (in the example Portals/0), but you should check, especially if you are using the UNC Share option.




[fig. q9] Now that we know what we want to import, let's actually do it, by navigating to the "Settings" section of our module, as shown in fig. q9



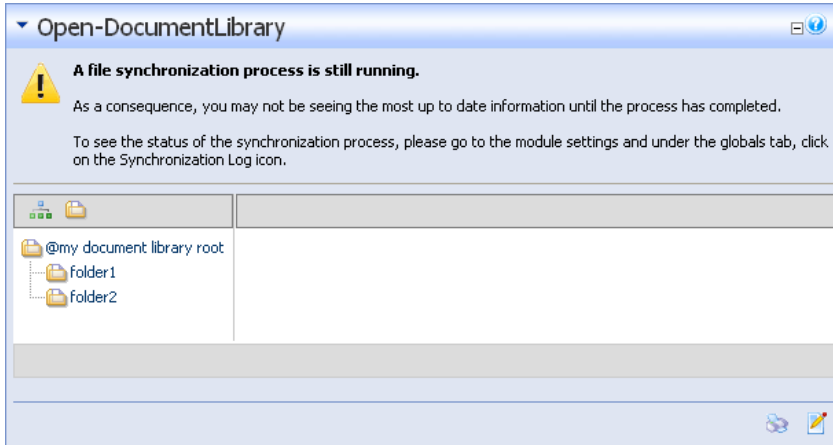
[fig. q10] Open-DocumentLibrary Settings are divided into two tabbed sections: Local and Global settings. For now we are interested in the Global settings only, and will explore local settings in later sections.

In the Global Settings, you'll see a "Root Folder" attribute, just like in fig. 10. Listed in the dropdown will be our folder: "@my document library root". Select it, and click on update.

Note the reports icon  in the "Synchronize" option row. Since selecting a root folder is equivalent to doing a first time synchronization,

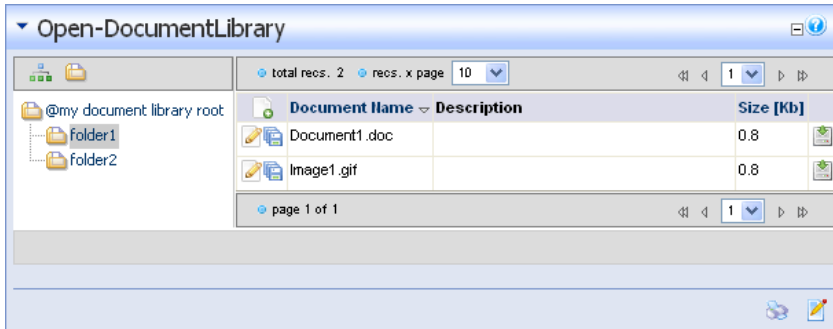


you will be able to come back to the Settings and click on the reports icon, and see the detailed log of your operation. We'll see this in fig. q12.

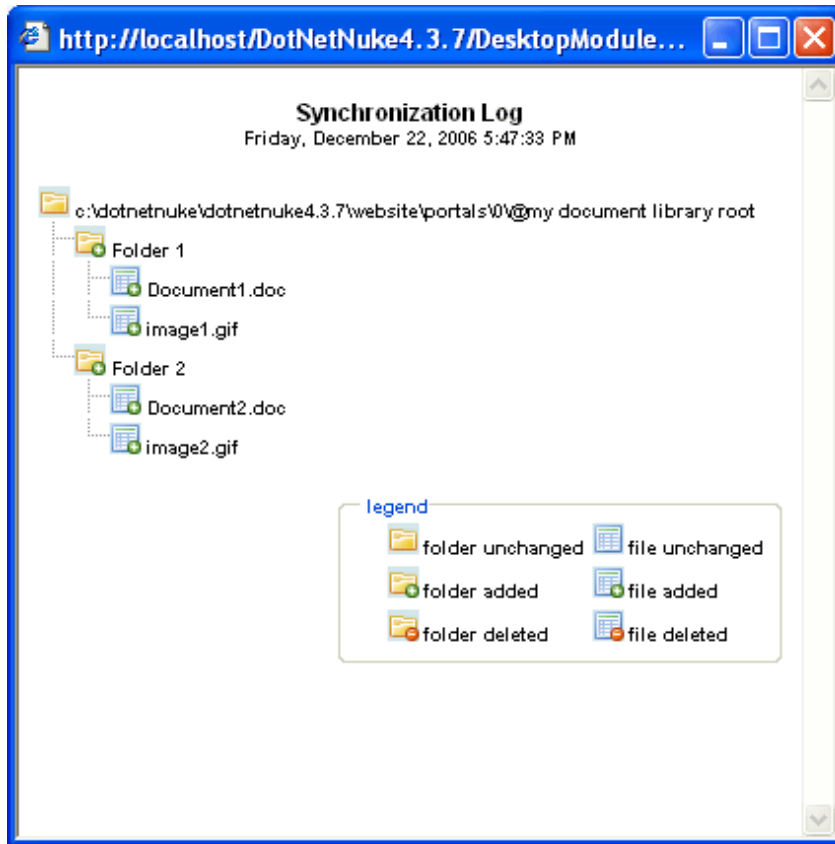



[fig. q10.b] Upon clicking update in the settings, you will be brought back to the O-DL main view. Since the Synchronization process is asynchronous, the folder may not have been fully synchronized yet, and you may see a message like the one displayed in fig q10.b. By refreshing the page, or by looking at the log, you will know when the process is done, and the warning

message will be removed. Non admin users will get a much more discreet message.



[fig. q11] Finally, you will be presented with the list of newly created folders. Under the folders you will be able to see the documents that have been added to the library.



[fig. q12] If you want to see what the synchronizations log reports, you can navigate to the Settings section and click on the  icon in the "Synchronize" option row. This report will show you a folder by folder and document by document event log in a popup window with an easy to follow graphical view.

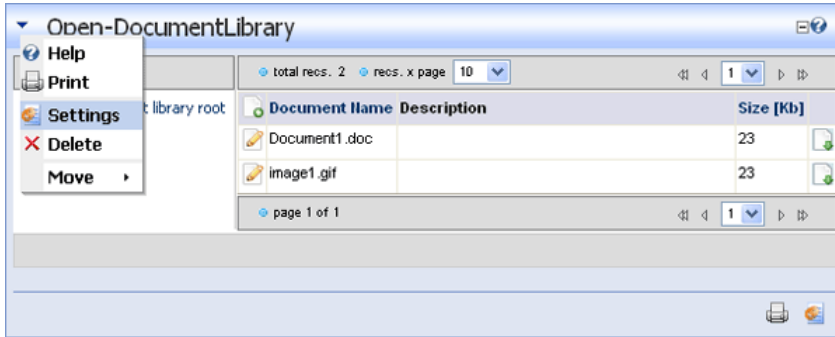
## Note

Once your library has been created, its folder security permissions are not set. Since security permissions are inherited by default, you will need to edit at least the root folder's security permissions (as explained in fig. q3).



## Module Detailed Help

### Open-DocumentLibrary Settings



[fig. s1] To navigate to the module “Settings” section, click on the actions menu and select “Settings” as shown in fig. s1

The Open-DocumentLibrary Settings module presents itself with 2 different tabs. Each tab has its own set of attributes that can be set. The Local tab's attributes will apply only to the module's page instance. The Global tab attributes will apply to all modules in a given portal.

Let's see each tab's attributes in turn:



## Local Tab

All options selected in this tab will apply to a specific instance of the module

The screenshot shows the 'Open-DocumentLibrary Settings' dialog box with the 'Local' tab selected. The settings are organized into two sections: 'Navigation Tree Options' and 'Document Grid Options'.  
**Navigation Tree Options:**

- Default Tree Mode:** Folder (selected)
- Allow Tree Mode Toggle:**
- Restrict Tree to 1 Folder:** - No Restrictions -
- Restrict Tree to 1 Category:** - No Restrictions -
- Hide Tree [Flat View]:**
- Allow Tree Horizontal Scroll:**

**Document Grid Options:**

	Default Sort		
	Display	Ascending	Descending
<b>Name:</b>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>
<b>Description:</b>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
<b>Size:</b>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
<b>Uploaded:</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
<b>Modified:</b>	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>

Buttons: Update, Cancel, Delete

[fig. s2]

## Navigation Tree Options

Navigation tree options allow you to control the way users can navigate through the document hierarchies. Some settings are mutually exclusive, so, when a setting excludes another, the module will automatically disable potentially conflicting options.

### Default Tree Mode:

This option lets you select the default tree mode you prefer. The navigation tree can be shown organized by folders or by categories. By default, the navigation tree will be shown organized by folders.

### Allow Tree Mode Toggle:

Check this option if you want to allow users to change the navigation tree mode. If you choose not to allow toggling, then users will only see the tree organized by either folder or category, without the



possibility to switch between the two views. [Administrators will continue to see the toggle options for administrative purposes].

### **Restrict Tree to 1 Folder:**

Select one folder if you want to restrict what users can see to one of the folders in the list. Through the tree, you will also be able to navigate to subfolders and documents belonging to the selected folder.

### **Restrict Tree to 1 Category:**

Select one category if you want to restrict what users can see to one of the categories in the list. Through the tree, you will also be able to navigate to subcategories and documents belonging to the selected category.

### **Hide Tree [Flat View]:**

Select this option to hide the navigation tree. Choosing this option will automatically display all the documents under the folder/category, including all the documents in subfolders/subcategories. It is necessary to specify a folder/category when this option is selected. This can be done by either selecting a folder/category from one of the restriction lists, or by passing the ID of the folder/category in the URL. [Administrators will continue to see the navigation tree for administrative purposes].

### **Allow Tree Horizontal Scroll:**

By Default, the navigation tree grows in size (horizontally and vertically) according to the number of folders that are open at any one time. Allowing Horizontal Scrolling will prevent the tree from growing in width, and present the user with the possibility to scroll to the right or left, in order to see the folders.

## **Document Grid Options**

Document Grid options allow you to control the amount of information that is presented in the grid that displays the documents as well as the default sort field and direction. Except for Document Name that is required, you can opt to show or not show the rest of the metadata.

### **Display Description:**

Select this option to view the description field of the document in the Document grid.



## **Display Size:**

Select this option to view the size field of the document in the Document grid.

## **Display Uploaded:**

Select this option to view the date and Display Name of the user that uploaded the document in the Document Grid.

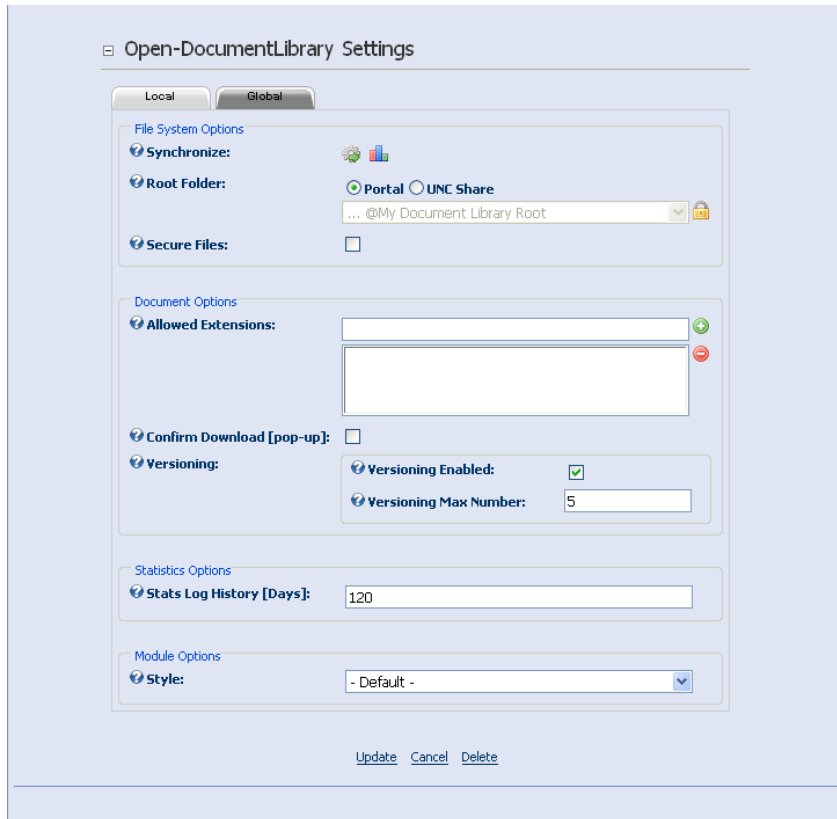
## **Display Modified:**

Select this option to view the date and Display Name of the user that modified the metadata of the document, in the Document Grid.



## Global Tab

All options selected in this tab will apply to all instances of the module in the given portal.





[fig. s3]

## File System Options

### **Synchronize:**

The Synchronize option allows you to perform two separate actions:

1. Synchronize the Database and the File System by clicking on the  icon
2. Once completed, you will be able to review the results in the Synchronization Log by clicking on the  icon (see fig. q12 for a sample report).

Synchronization adds folders/documents that were added directly to the file system to the database and removes folders/documents from the database that were removed from the file system manually.

The process is asynchronous.



## Root Folder:

[see also Quick Administration and Configuration/Option2 Import a Library].

This option allows you to select a new root folder, to store the folders and documents, in the physical drive. When a folder is selected from the list, the Database and the File System are automatically synchronized [see File System Options/Synchronize].

You will have the option to use the default DNN home directory/subdirectory by selecting the "Portal" option, or to simply choose any folder either local or in a UNC share. If you do choose a folder that is not under the Portal option, then you should make sure that the ASP.NET user or Network Services user has the appropriate access rights to the folder (read/write/modify).

## Secure Files:

If checked, this option will protect your documents from direct download, by renaming them to a type of extension that is not directly served by a Web Server [xSDL.resx]. As a result, the only possible way to access the document will be through the document library interface.

When unchecked, this option will allow documents to be downloaded directly from a web browser or to be referenced by links, as long as they are in a virtual directory or under the DNN Home Directory. In a UNC share or local folder that does not have any of the above prerequisites, direct access will not be possible.

## Document Options

### Allowed Extensions:

Allows you to add a new extension in the list of file extensions that will be allowed for upload. The extension needs to be added in the following format: '.ext'. If there is no extension specified, all extensions will be allowed.

### Confirm Download [pop-up]:

When checked, this option will show a pop-up window with additional information, before a download is started. If unchecked, the download will start directly.



## **Versioning:**

Versioning will allow you to save a specified number of copies of the documents you upload. Every time you re-upload a new version of the same document, the previous version is saved and can be restored on demand. You can also save a version of your document any time you want to, by editing the document, and clicking on the "Add Version" icon.

## **Statistics Options**

### **Stats Log History [Days]:**

Enter the number of days that you want to retain folder, category and document statistics information.

## **Module Options**

### **Style:**

This option allows you to change the look of the module by simply selecting a predetermined module style from the list of available styles. The conventional way of changing module style by modifying the "module.css" file directly, is always available.

#### **Note**

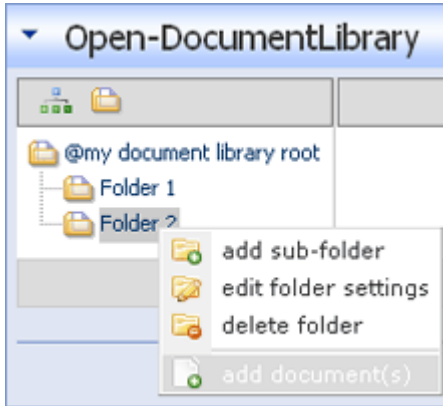
Once the style has been changed, you may need to hard refresh your browser a couple of times [ctrl + f5] in order to replace the cached version of the style with the new one.



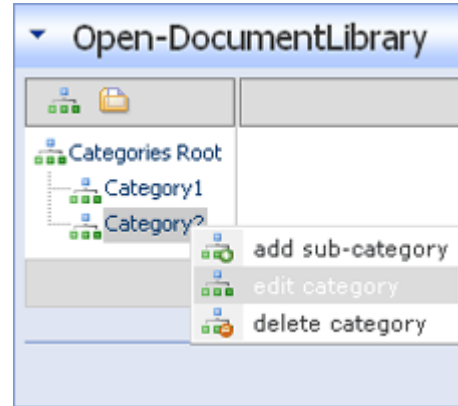
## Open-DocumentLibrary Admin

Normal administrative operations such as adding/editing folders, categories and documents can be performed directly from the navigation tree, just like in a normal windows explorer.

If the user has the appropriate security permissions, he/she will be presented with a series of context menus by **[right clicking]** on the folder or category in the navigation tree as shown in figs. a1 and a2.



[fig. a1]



[fig. a2]

**[Drag & Drop]** It is also important to mention that just like a true windows explorer, folders can be moved around by drag & drop operations. So, if you want to change a folder hierarchy, just drag it on top of another folder, and the dragged folder will become the child of the target. Thanks to our Ajax implementation, the change will be performed without the need for a page refresh.

In the next sections we will explore what the user can do with each context menu option.



## Folders

Let's start by taking a look at the folder operations that can be performed through the context menu, and then we'll go into the details of what each option/attribute in the screenshots does.

**Add sub-folder:** Adds a new child folder to the selected folder. This discussion will also serve as an in-depth description of the options/attributes available when adding a folder, and is identical to what can be done when editing a folder.

[right click] to display the context menu, and select the option "📁 add sub-folder".

You can set every folder property, like name, parent folder or security.

See fig. a3 – a4 for the available options and explanations on how to proceed.

**Edit Folder Settings:** Edits the selected folder properties. The "Edit Folder" form, presents itself exactly as the "Add Folder" form described previously, with the various attributes already filled in.

[right click] the right button and select the option '📁 edit folder settings'.

You can change every folder property, like name, parent folder or security.

See fig. a3 – a4 for the available options and explanations on how to proceed.

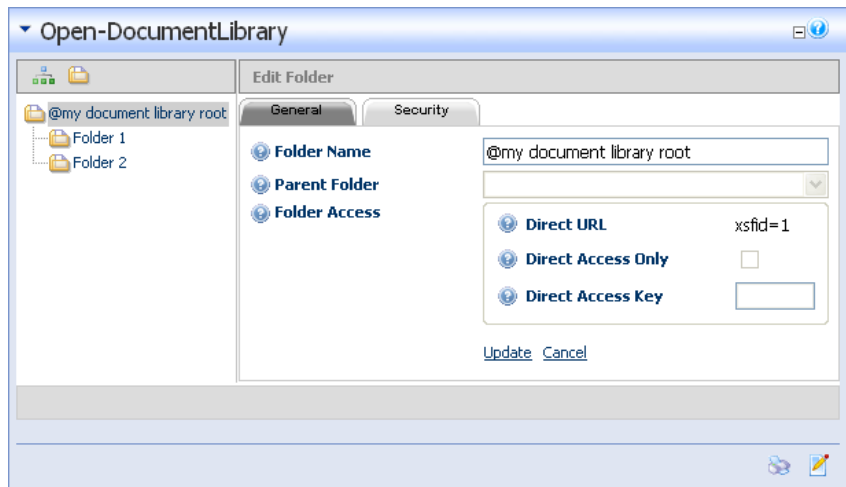
The parent folder of a specific folder can be also changed through drag & drop utility. Just select the folder you want to move, click the left button and drag to the folder to the chosen parent folder.

**Delete Folder:** Deletes the selected folder.

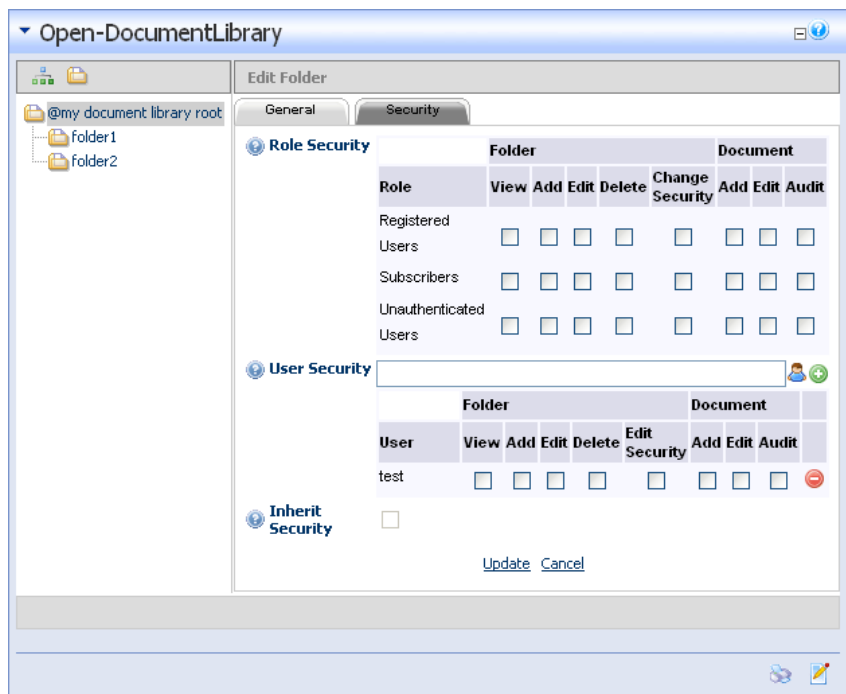
[right click] the right button and select the option '📁 delete folder'.

This operation will delete the folder from both the database as well as the file system.

As we have seen before, Folder operations are Add, Edit, and Delete. All folder operations are performed through a context menu that leads to a screen like the one presented below (the screen will change slightly depending on the mode: add/edit/delete) and the permission level of the actual user. If for example a user has edit rights but no security rights, the "Security" tab would not be displayed. For the purpose of our discussion, the following two screenshots will be used as reference.



[fig. a3] General Tab



[fig. a4] Security Tab

## General Tab

**Folder Name:** Enter a name for the Folder.

**Parent Folder:** Select the parent folder for the current folder.

**Folder Access:** This group of attributes determines if and how a folder can be accessed directly through a url or though settings specifications.



**Direct Url:** If linking to this page through an external link, and you only want to show the contents of this specific folder (and all of its sub-folders), this is the parameter to be added to the url.

Adding this parameter to the url will achieve the same results as setting the value of 'Restrict List to 1 Folder' in the module settings.

**Direct Access Only:** Select this option if you want this folder to be hidden from general view, unless accessed directly through the 'Direct URL' parameter or through settings the value of 'Restrict List to 1 Folder' in the module settings.

If the folder marked for direct view contains children, all children will also be visible, unless those children have also been marked for direct view as well.

**Direct Access Key:** If you want to key protect a "direct access only" folder, enter a unique key. The key will be required in order to access the folder.

If you do add a key, and you access the folder through the 'Direct URL' method, then you'll need to place both the xsfid parameter as well as a new key parameter in the url.

If you access the folder through the 'Restrict List to 1 Folder' method, then you'll need to place only the new key parameter in the url. [url format: xsfid=id&xsfk=key]

## Security Tab

**Security:** Click on Security tab to set the proper rights to every folder.

You can select '**Inherit Security**' option if you want this folder to inherit security permissions from parent folder.

Permissions related to **Folders** are:

**View:** Users that belong to a role with this right can view the folder in the navigation tree. This right only allows view access to the folder and documents. There is no context menu associated with this right.

**Add:** Users that belong to a role with this right can add sub-folders to the folder. Roles that have been granted add rights will have access to the context menu, and will be able to see the "add sub-folders" option.

**Edit:** Users that belong to a role with this right can edit the folder. Roles that have been granted this right will have access to the context menu, and will be able to see the "edit folder settings" option. Roles that have Edit rights do not necessarily need to have



security rights. Security rights are granted through another option (see below Edit Security).

**Delete:** Users that belong to a role with this right can delete the folder, through the context menu that will display the “delete folder” option.

**Edit Security:** Users that belong to a role with this right can view the “Security Tab” when editing a folder, and then will be able to assign security rights to the various roles.

Permissions related to **Documents** are those permissions that apply to all documents in the folder.

**Add:** Users that belong to a role with this right can add new files to the folder. Roles that have been granted this right will have access to the context menu, and will be able to see the “add document(s)” option.

**Edit:** Users that belong to a role with this right can edit the files stored in the folder. To edit the documents (metadata), they will see an edit icon next to the document in the grid.



## Documents

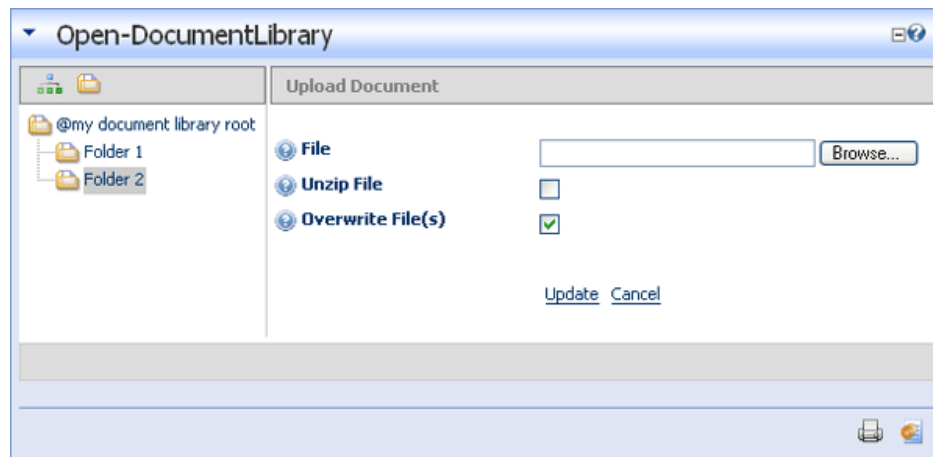
The context menu that appears when you [right click] on a folder, can also allow you to add documents to the folder if you have been granted the right security permissions as we saw in the previous section.

**Add Document:** Adds a new document to the folder.

[click] on the Folder to select it.

[right click] to display the context menu, and select the option "add document".

You'll see the following screen where you can insert the new folder's properties.



[fig. a5]

**File:** This option allows you to select a file from your file system. [click] 'Browse' button and select one file from your file system.

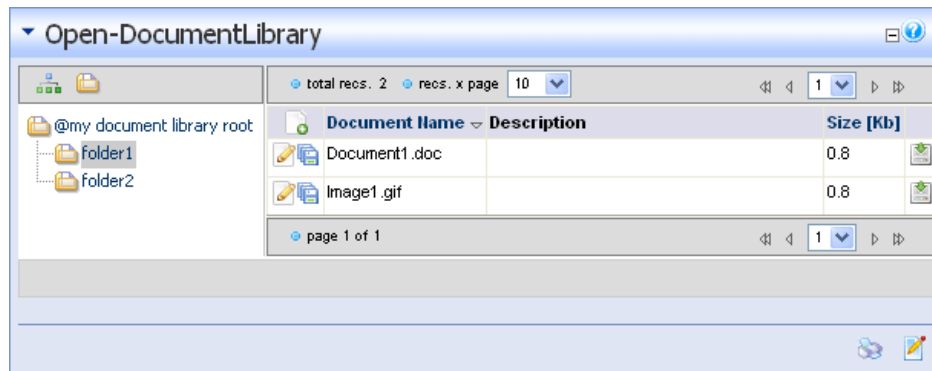
**Unzip File:** Select this option to unzip the uploaded .zip file. If the .zip package contains a structure of folders and sub-folders, the corresponding folder structure will be created in the module. After unzipping the uploaded .zip file, it will be removed.

**Overwrite File(s):** Select this option to overwrite files in case they already exist.

**Edit Document:** This option is not available through the context menu, but it is treated here for completeness. The option allows the authorized roles to edit the document's metadata

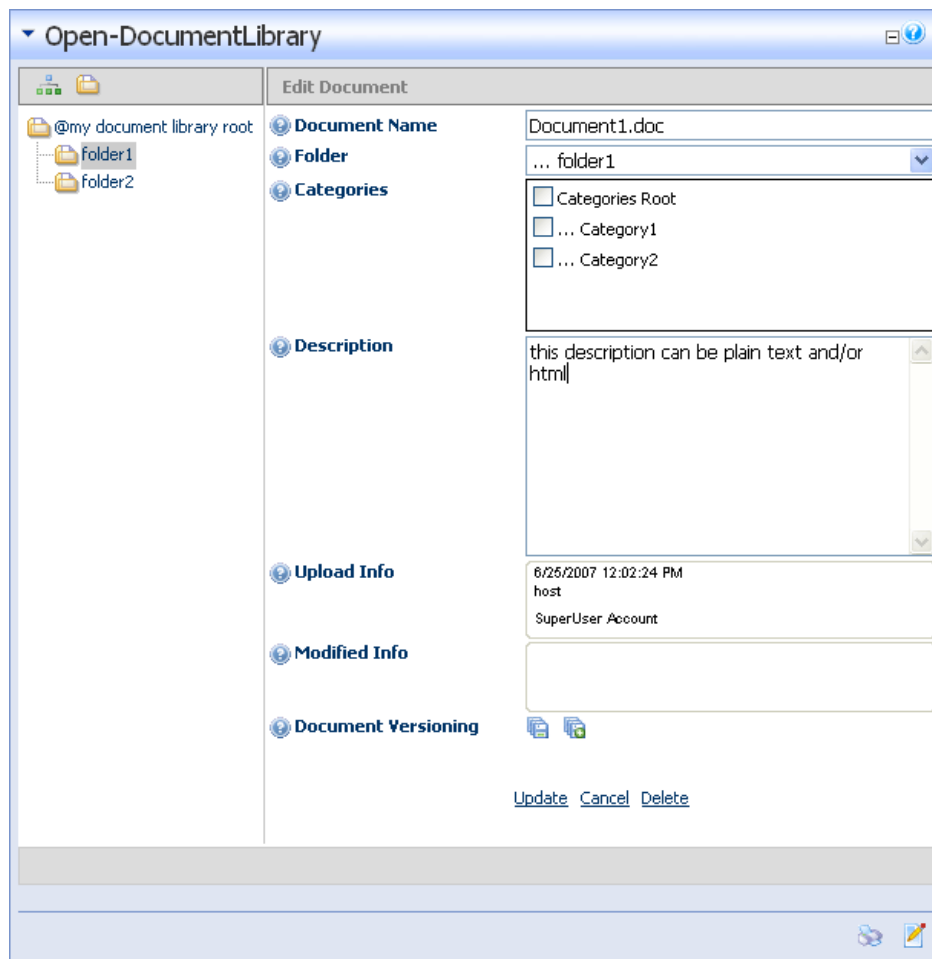
[click] on the Folder to select it.

You'll see the following screen where you can edit the document's metadata.



[fig. a6]

[click] on the "📝" (Edit) icon. You'll see the following screen where you can edit the document properties.



[fig. a7]



**Document Name:** Enter a name for the document.

**Folder:** Select a folder to store the document in.

**Categories:** Select the categories you want to associate with the document. This will allow the document to be shown in multiple categories when the tree mode is Category.

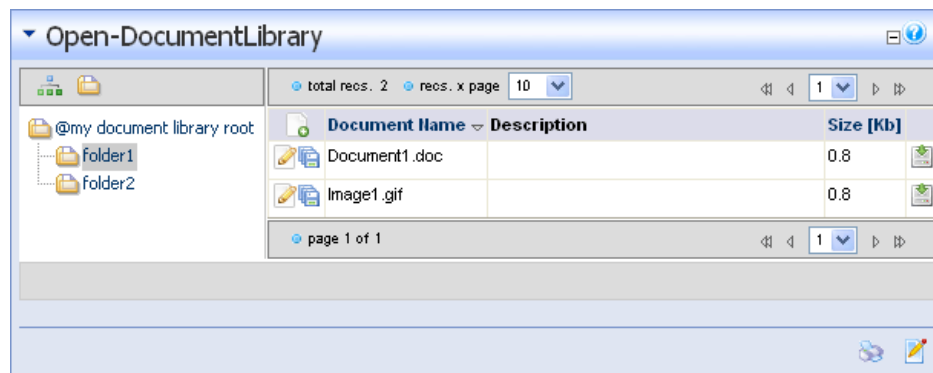
**Description:** Here you can enter a description for the document. This description can contain html and images if you want to. Also, you always have the option not to display the description by going to the settings and uncheck the "display description" option for the document grid.

**Document Versioning:** Here you can click on the view icon to view versioning info or on the add icon to save the current document as a new version.

**Download Document:** Downloads the selected document to your local file system.

[click] on the Folder to select it.

You'll see the following screen where you can edit the document's metadata.



[fig. a6b]

[click] on the "Download" icon. You'll be asked to either open the document or to store it in a folder in your local file system.

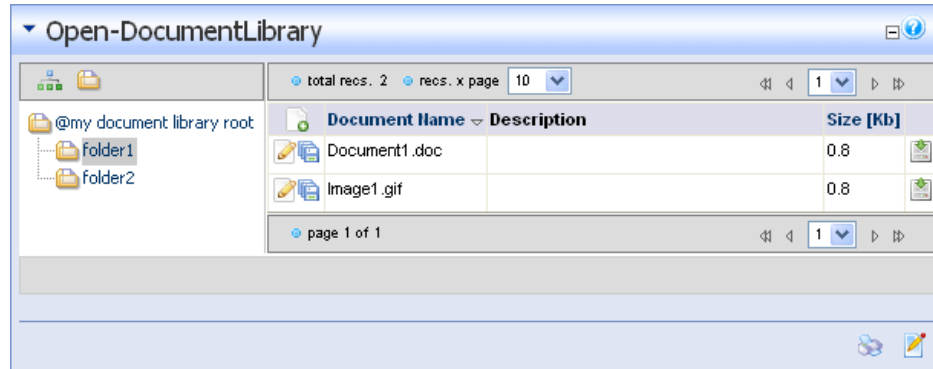
**View Document Version Info:** Displays version information and gives the admin user the ability to restore, permanently delete or download previous versions of the document. A version is




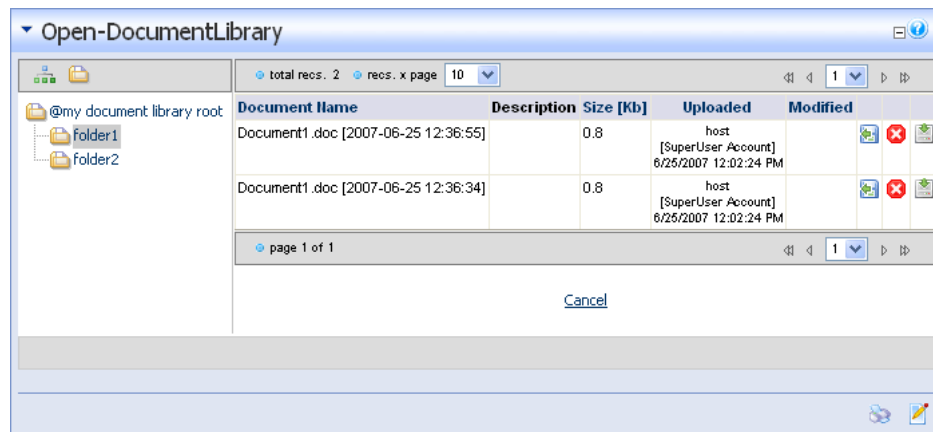
automatically created every time a document is re-uploaded in the same folder and with the same name. You can also manually create a version while editing a document.

[click] on the Folder to select it.

You'll see the following screen where you can edit the document's metadata.



[click] on the “” (view version info) icon. You'll be brought to the following screen:



Where you'll be able to restore, delete permanently or download each version of the document.

When you restore a document, the restored version becomes the current document, and what was the current document gets added as a new version.

If there are no versions saved, this section will be empty.



## Categories

Categories represent another way of classifying documents. The same document may belong to different categories.

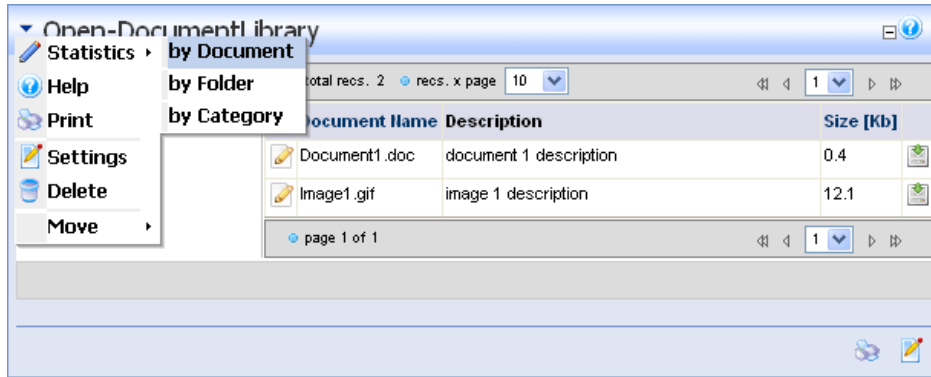
Categories work exactly as folders... except for versioning and user level access rights and that you do not create a "physical" category in order to store a document in a category.

Since the discussion on folders also applies to Categories, the user can refer to the folders and its operations in order to understand the way categories are managed.



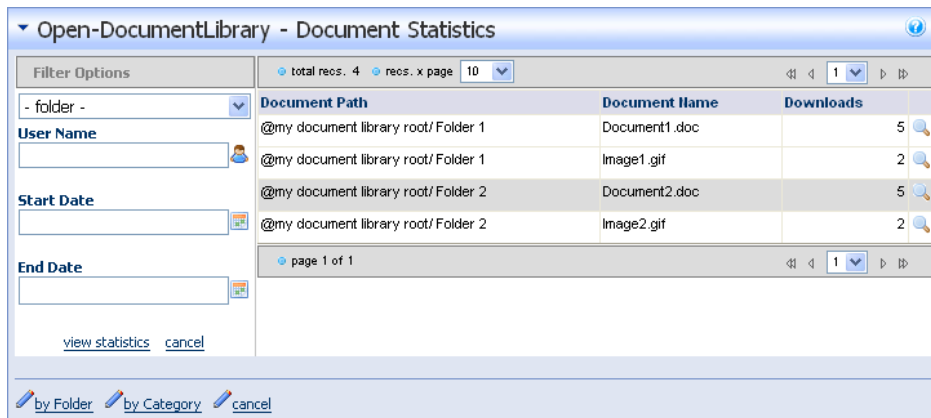
## Open-DocumentLibrary Statistics

Open-DocumentLibrary offers a comprehensive set of statistics tools that will allow you to keep track of user behavior and preferences.



[fig. st1] To navigate to the module “Statistics” section, click on the actions menu and select “Statistics/by...” as shown in fig. st1. You can choose from three specialized statistics sets: Document Statistics, Folder and Category statistics. In the next examples we

will look at Document statistics, but keep in mind that the same principles apply to Folder and Category statistics.



[fig. st2] Once you select Statistics by Document, you will be brought to the “Document Statistics” control pane, where by default, you will see a list with a summary of all download activity.

You can refine the results by selecting or entering information such as: 1) the folder for which you want to see statistics, 2) the user name for which you want to see statistics 3) start and end dates of statistical information retrieved.

To see the details of any of the items in the list, click on the “🔍” (looking glass) icon, and you will be presented with a detail section as in the following image.



Open-DocumentLibrary - Document Statistics

**Filter Options**

- folder -

**User Name**

**Start Date**

**End Date**

[view statistics](#) [cancel](#)

**Download Details**

**Document Path** @my document library root/ Folder 2  
**Document Name** Document2.doc

Module Page	User Name	Timestamp
Home	SuperUser Account	4/16/2007 12:38:00 PM
Home	SuperUser Account	4/16/2007 12:38:00 PM
Home	SuperUser Account	4/16/2007 12:38:00 PM
Home	SuperUser Account	4/16/2007 12:38:00 PM
Home	SuperUser Account	4/16/2007 12:38:00 PM

total recs. 4    recs. x page 10

Document Path	Document Name	Downloads
@my document library root/ Folder 1	Document1.doc	5
@my document library root/ Folder 1	Image1.gif	2
@my document library root/ Folder 2	Document2.doc	5
@my document library root/ Folder 2	Image2.gif	2

page 1 of 1

[by Folder](#)   [by Category](#)   [cancel](#)

[fig. st3] The statistical details will show the page on which the module was placed, the user name and time at which the module was downloaded.

### Note

To set the number of days that you want to keep statistical information, you can navigate to the module Settings, and under the Global tab, configure the Stats Log History [Days] attribute.