How to Manage Document

by [OSOE Project](#).

▼ Details

This visual guide is part of a collection of documents created by the One Student One ERP (OSOE) project in collaboration with Institut Mines Telecom, Telecom Bretagne, Dresden University of Technology and the South Westfalia University of Applied Sciences. It can be used to teach modern ERP theory and practice to undergraduate students or professionals.

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Agenda

- How to create a document
- How to release the document
- How to prepare the second version
- How to publish the second version
- How to use fast contribution

▼ Details

In this presentation, we are going to explain how to create and release a document, prepare and publish the second version, as well as the fast contribution way to document module.

Manage Document Versioning

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In an organisation, it happens very often that a document has different versions for different purposes. In order to manage all your documents in the right order, it is important to firstly manage document versioning.

Create a new document

▼ Details

In ERP5 you can create many different documents. In order to add a document, you can **click on the tab 'New'** then choose the kind of document you want to create. In our example we will **create a text** document.

The available documents are:

- **File**: it can contain whatever you want without any requirements of format or size. It must be used if the document you wish to contribute is not one of the other available formats.

- **Drawing**: It is for document created with Open Office draw software or equivalent.

- **PDF**: It is for any document you only have in PDF.

- **Text**: it is for text documents created with Open Office writer or similar software.

- **Presentation**: it is for every presentation created with Open Office Impress or equivalent software.

- **Spreadsheet**: it is for every spreadsheet created with Open Office Calc or equivalent software.

- **Image**: it is for every images which you want to contribute to ERP5.

- **Web Page**: it is to create web page to put in your website if it is managed thanks to ERP5.

Note: ERP5 document module can convert original documents in many different format so you must only upload your document in the original format. Please refer to "DMS Cheat Sheet" to learn about document conversion.

Edit the document "View" page

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Once you created the document into ERP5, you have to fill in the information to categorize your document.

The first information to enter are the Identifiers fields. Those fields are the one which will be used to create a unique reference for the document. You have to fill in the:

Title: Which is the complete title of the document

Short Title: which will mainly be used in breadcrumb

Reference: must be unique to this document. It will be used in the URL of the document. it is important to follow the [Convention of Reference in ERP5](#) about documentations. The Reference of each document should be unique to retrieve a page easily. For example, "user-Howto.Manage.Support.Request".

Version: you must choose the version of the document. Start at 001, then increase it for each version

Language: choose the language of the document. The field should contain two letters according to the ISO601 standard for languages. It will be used to display the proper document depending of the language of the interface.

You have a field where you can add the name(s) of the contributor(s).

▼ Details

Then you have to **choose the classification** of the document. The Classification defines who can access, modify or use this document.

Then comes **few categories which will allow you to classify** your document as you would have done with a paper document. You will choose the Group and the site it refer to. Then the function of the document if it has one. Finally you can **choose one or more publication section** for the document.

Upload the file

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Once you saved all information required to classify the document, you can upload the original document into ERP5.

For that you just have to click on 'Browse' then to select the document on your computer. It will then write the path to the document into the field. When you click on the Save button, the document is then uploaded and converted.

You must take a look at the 'File State' of the document. It will tell you if there is a document or not (ie. empty), and if the document is ready for use (ie. Converting or Converted).

We can see that the 'Revision' which is under the 'File State' is increasing each time we click on the 'Save' button. This is because the system keep track of every changes which are made on the document.

Work on the document

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When you want to work on the document, you first have to download an editable file, then do the changes you want and upload it again.

In order to download the file, you must click on the Import/Export Icon, then select Export. You can choose the format of the file and the name of the file which will be created. By default the name is 'Reference-Version-Language'. It is a good name since it create a unique file name for this document.

Once you download the file, you can edit it with the proper software. We recommend you to use Open Office.

Once it is finished, you can re-upload the file as you did before. Click on 'Browse' on the main tab of the document, select the document on your computer, then click on the 'Save' button.

You can see that the revision number has increased. Each change is recorded and kept in the system so you don't lose any information.

Note: Be careful when you have the document on your computer, anyone can download, edit and upload the new version of the document. If you upload your file after, you will erase his/her changes. You must perform your changes as quickly as you can, and make sure that no one else is working on it in the same time.

Release the document

▼ Details

Once you created a document which is good enough, you can create a release. A release means that you mark the document as the official version of this document. For that you can use the menu '**Action**' >> '**Release Document**'.

Releasing a document is an important step. It makes the document official. It is not any more a working copy of the document, but it is a document which can be used.

Hide/Publish/Share

▼ Details

In order to share this document, you will have to choose different level of publication. You can choose between hiding the document, sharing it and publishing it.

Hide: Hiding the document is used when you already shared it or published it and that you want to correct something on it. When you do so, only users who have the rights to edit the document can view it.

Share: Sharing the document is used to share it within a specific area of users which can log into your system. Depending on the Classification of the document, and the users role within groups or projects, users of your instance will be able to see the document or not.

Publish: Publishing a document will make it completely public. You can then give the URL to anyone, he will be able to see it:

https://www.tiolive.com/**instanceID**/document_module/**document.reference**/view

Prepare next version

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After publishing the first version of your document, you might want to work on the next release. You could create a new document from scratch, but the easiest way is to duplicate the document which already exist, then to increase the version of the document.

We now have a new working copy of the document to prepare the next version. You can work on it as we explained before.

Release/Publish the second version

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As long as the new working copy stays in draft, the state of the previous version won't be changed. If you either share or publish it, the older version will be automatically archived.

You are now able to manage and keep track of all your documents.

Note: Don't forget to create 'Naming Convention' for the reference of your documents. It will unify the references used for your documents, and when the 'Naming Conventions' are well known by every one, it is easier to search a document thanks to its URL just because you can guess how the reference should look like.

Quick Contribution

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When you want to upload a document into ERP5, you have the possibility to use the 'Contribute' tab at the root of your ERP5 instance.

If you want to use it properly, you should use the property of the document. On Open Office it is '**File**' >> '**Properties**'. You then can set up the:

- **Title**: Title of the document
- **Keywords**: keywords related to the document

- **Comments**: description of the document

You can also add custom properties on your document:

- '**Language**': to fill in the language of your document
- '**Reference**': to set the reference of your document
- '**Version**': to set the version of your document.

Once all those properties are filled out and the document is saved, you can upload it thanks to the '**Contribute**' action, and all those properties will be displayed in the right fields.

The same will be done by ERP5 with your document, if you download a document from it, ERP5 will fill in all those properties.