# Document Management Script

Clip Link: http://www.eshbel.com/Movie_Search/Document_Management_clip.htm
Note: Yellow highlights indicate action instructions.

## Introduction (00:00-01:20)

***Priority*** provides organizations with several options for maintaining and organizing work-related documents or other files directly in the cloud, with no need to ever save a local copy. These options enable multiple users to share and collaborate on individual files, such that:

- Each user can access their documents and files from any device, including smartphones, tablets and PCs.Files that are currently in use are locked for editing by other users. This enables you to maintain a single, up-to-date copy of each file, rather than multiple copies, each containing a different set of revisions.
- Permissions enable you to grant each user the desired level of access to a given file or folder.
- ***Priority***'s **Enterprise Search** tool scans the contents of each file for your search terms and any matching files show up in the search results.

***Priority*** files can be managed using ***Priority***'s **File Explorer**, or you can simply attach a file to any of a variety of ***Priority*** records, including customer or part records, financial documents, sales and shipping documents, etc. The process of importing and working with these files is fairly similar for both options. Let's begin by demonstrating how to attach files to a ***Priority*** record.

## Attaching a File to a Form Record (01:21-03:10)

Any file that you attach to a ***Priority*** record is stored on the ***Priority*** server, and a link to the file is added to the form record in question. Consider the following example: suppose one of your customers requires all vendors with which they do business to sign a supply contract and confidentiality agreement. Signed copies of each document can be attached to the relevant customer record for future reference. First, open the **Customers** form and retrieve the customer in question. Next, enter the **Customer Documents** sub-level form and move the cursor to the **File Path** column. Now click the icon that appears, in order to locate and select any files you'd like to import from your local hard drive. Note that you can attach several files simultaneously by holding down the **Ctrl** key and clicking on each item you want to attach.
The system automatically records the date each file is created, the name of the user it was last **Modified by** and the date it was last modified. The **File Path** column is also filled in automatically for each of the imported files, along with the original **File Name**. You can revise the **File Name** that appears in this form if desired, but keep in mind that this has no effect on the file itself.You can continue to attach additional files to the same customer record as needed; for instance, by right-clicking the file icon and selecting **Import**.

Note that the icon that appears in the **File Path** column now reflects the relevant file type: in this case, a Word document. Any user with access to this form can click this icon to open the attachment.

**Working with Files (03:11-03:26)**
You can work with the file as usual and then save any changes, without changing the file name or path. The file is backed up in a temporary directory on your local machine while open, and then synchronized with the system automatically when it is closed.

**File Status (03:27-04:48)**
Upon opening the file, the **File Status** is updated automatically to indicate that the file is currently in use and only a read-only copy can be opened at this time. This mechanism prevents other users from revising the original file while you are working with it, and thus ensures that multiple collaborators do not inadvertently create multiple copies of the file, each containing a different set of revisions. The **Locked by** column shows us which user is currently using the file. Once we close the file, it is updated on the server and released for other users. Refresh the record to see the updated **File Status**, now indicating that the file is free.

Note that your system manager can set an upper limit on the amount of time that files remain locked for editing by a given user. Once the maximum time is exceeded, other users who attempt to open the file will be notified that they can unlock it for writing, if necessary. This option should be used sparingly, however, as the original user may still be in the midst of editing the file and there may be significant changes to the file that have not yet been updated in the system. If the original user continues to edit a file that has since been released and modified by another user, the file containing his or her changes is saved in the temporary directory, but will not be synchronized automatically. It can, however, be imported manually if necessary.

**Attaching a File to Multiple Form Records (04:49-06:19)**
As we mentioned earlier, the files we attached to this record are now stored on the ***Priority*** server, and the attachments we see in this form are essentially shortcuts pointing to the original item on the server. These shortcuts can be copied to any other record in the system, as needed. For instance, we can link the supply contract signed by the customer to a sales invoice opened for the same customer. First, we'll move to the **File Path** column and copy the entire path to the clipboard - for instance, by pressing **Ctrl+C.** Next, we'll open the **Sales Invoices** form and retrieve the desired invoice. Moving to the **Attachments** sub-level form, we'll place the cursor in the **File Path** column and paste in the file path - for instance, by pressing **Ctrl+V**.

Note that whatever file status is assigned in one location is automatically applied to any other locations from which the file can be accessed. Let's demonstrate this using the file we just linked to this invoice. We're going to use the **File Status** column to manually define the attachment as "Read Only", and then look back at the **Customer Documents** sub-level of the **Customers** form. Press **Ctrl+M** to refresh the records in this form. As you can see, the

**File Status** has been updated here as well, indicating that the file is currently in use. In other words, once the file has been locked for editing in any location, it will open in read-only mode no matter where you access it from.

**Attaching Files Using Paste & Import (06:20-07:06)**

You can also copy a file and paste it into the **Attachments** form, at the same time importing it onto the ***Priority*** server. For instance, you can copy one or more MS-Outlook attachments, or copy any file from the Windows Explorer, and then use the **Paste & Import** command to paste it directly into ***Priority***.
You can also use the **Paste & Import** command to attach a screen capture. Simply press the **Print Screen** key on your keyboard and then use the **Paste and Import** command to import the capture to any attachment form.
Both the **Import** and the **Paste & Import** commands are also available in the **File Explorer**, as we'll demonstrate later, and offer the same functionality.

**Copying Vs. Duplicating (07:07-08:00)**

When you copy a ***Priority*** file from one location to another - for instance, by pressing **Ctrl+C** - this creates a shortcut pointing to the original item, which can then be pasted into another ***Priority*** record or into the **File Explorer** (e.g., by pressing **Ctrl+V**). In some cases, however, you may prefer to duplicate the file instead, thereby creating a new copy of the file on the ***Priority*** server. To duplicate a file, right-click the file in question and select the **Duplicate** command. You can then rename the file, revise it as needed and save your changes. In this way, you can create as many documents or other files as you need directly in the cloud, with no need to ever save a local copy. Note that both the **Copy** and **Duplicate** commands can also be used to copy or duplicate files within the **File Explorer**.

**Copying a Document Link (08:01-09:43)**

You can export any files that have been attached to a form record from within the attachments form, using the **Save as** command. However, you may prefer to simply include a link to the file in a ***Priority*** text form or an external document, such as an Outlook message or Word document. To copy a document link, press **Ctrl+Y**. A link to this file has now been copied into the Windows clipboard and can be pasted where desired. Let's paste this document link into a new e-mail message in Outlook. And now we'll simply paste the document link into the message by pressing **Ctrl+V**. Note that the same keyboard shortcut can also be used to copy a document link within the **File Explorer**.
Upon receiving an e-mailthat contains a document link, recipients can press **Ctrl** and click the link to open a read-only copy of the attached file. If you want to edit the file, however, you'll need to open it from the attachment form itself, where there are status management capabilities in place to ensure that other users aren't working on it simultaneously. Thus, if you anticipate that other users may need to edit the document in question, it is preferable to simply provide a link to the relevant form record (e.g., the sales invoice). This method also enables you to limit access to users who are authorized to view the record in question. So, let's move to the upper-level **Sales Invoices** form and press **Ctrl+S** to create an e-mail

message containing a link to the record, which we can then edit as desired. Authorized users can use this link to access the sales invoice, and then enter the **Attachments** sub-level form to work with the attached file.

**Removing Attached Files (09:44-10:34)**

Should you wish to remove an attachment from a form record, you can do so at any time by selecting the file in question and pressing **Ctrl+Del**. Similarly, you can press **Delete** within the File Explorer attachment form to remove the file from its current location in the Explorer. Note, however, that so long as the file is still linked to other system locations, such as other form records or folders in the **File Explorer**, it will *not* be deleted from the ***Priority*** server, and will still be accessible from these locations. The file will only be deleted from the server once it has been removed from *all* system locations. To view a list of any system locations to which a particular file has been linked, simply enter the **Links to File** sub-level form. One of the lines in this form always displays the current record; in this case, a sales invoice.

**Attachment Columns in a Root Form (10:35-11:19)**

While attachments are usually added to ***Priority*** records via a sub-level form, as in the examples we've seen so far, several root forms (e.g., the **Part Catalogue** form) also include a folder icon for attaching a file. This particular field is meant to be used to attach an image – for example, a picture or sketch of the part in question. The procedure for attaching an image to the part record is the same as the procedure used to attach files to any form record. The attached image now appears instead of the folder icon. You can click the image to open the file, as you would with any other attached file, or you can simply position the mouse over the magnifying glass icon to view an enlarged image within the current window.

**The File Explorer (11:20-12:37)**

Users can work with the **File Explorer** to organize files and folders that are stored on the ***Priority*** server, in much the same way as you use Windows Explorer to organize the files and folders on your computer. Access to each folder is governed by the same privilege mechanism in use throughout ***Priority***. For instance, all of your sales and marketing materials can be maintained in a single folder in the **File Explorer** and individual files can also be linked to related ***Priority*** records, such as customer or part records, customer tasks and sales opportunities, for easy access. In such a case, a single copy of each file is stored on the server and a shortcut is used to access that file, whether you choose to do so from the **File Explorer** or via a specific record in ***Priority***.

To run the **File Explorer**, we'll select the **File Explorer** command from the **File** menu. You can click on any folder in the left pane to view its contents (in a hierarchical structure). Individual files and sub-folders appear in the right pane. Various commands for working with this tool appear in the upper **File** and **Edit** menus, and can also be accessed when you right-click on a file or folder in either pane or right-click an empty space in the right pane.

**Working with the File Explorer: Creating a Folder (12:38-13:14)**

Next, we'll demonstrate how to create a new folder in the File Explorer and define permissions for the folder. Folder permissions are defined per privilege group -- the same privilege groups that are used to assign privileges for ***Priority*** forms and other entities, generally representing the various departments in your organization. Let's start by creating a new folder in which to work. To do so, I'm going to right-click the main folder and select **New Folder** from the drop-down menu. Next, let's click on the folder and change its name to, say, "Marketing".

**Defining Folder Permissions (13:15-16:39)**

Upon creating the "Marketing" folder, I have automatically been granted full administrator permissions for this folder. I can now define permissions for other users, thereby determining who else can view and modify the folder and its contents. To do so, I'm going to right-click the folder and select **Permissions**.

A window opens in which we can see the types of permissions that are assigned to different privilege groups for this folder. Each level of permission is represented by a different letter. 'R' stands for read, indicating that users with this level of permission can view the folder's contents but not modify them. 'W' stands for write, indicating that users with this level of permission can modify the folder's contents 'A' stands for administrator, indicating that users with this level of permission can view and modify the folder's contents, and assign folder permissions to other privilege groups. '!' stands for navigation, indicating that users with this level of permission can navigate within this folder and its sub-folders, but cannot view or modify the folder's contents. Lastly, 'X' indicates that the user has no permissions for the folder. The current permissions were inherited automatically from the main folder, and can be changed manually for any folder that you create.

In this example, we're going to concentrate all of our marketing collateral in the new "Marketing" folder we just created, which will be accessible to all sales staff. We'll then divide the materials in this folder into sub-menus, in order to differentiate between domestic and international sales staff. Let's start by making sure that all sales managers have full administrator permissions for the "Marketing" folder and its contents. So, we're going to right-click the Sales Manager privilege group and, in the pop-up menu that opens, we'll select "Administrator Permission". We'll also assign Navigation permissions to both domestic and international sales teams. This permits them to navigate within the folder and to open any sub-folders for which they've been granted permissions. Finally, we'll click **OK** and the permissions we defined are now in effect.

Let's create a new folder within the Marketing folder, in which we'll maintain copies of the company's brochures. This folder automatically inherits the same permissions we've just assigned to the "Marketing" folder, meaning that all sales managers have full administrator permissions and that all sales teams have navigation permission only. Let’s grant read-only permissions for this folder to both domestic and international sales teams., so that users in either privilege group can view the folder's contents, but neither group will be able to modify these contents. Click **OK** to save these definitions.

Now we'll create a second folder within the Marketing folder, in which we'll maintain materials that are only used for domestic sales. This folder also inherits the permissions we assigned to the "Marketing" folder. Let’s grant read and write permissions for this folder to the domestic sales privilege group and revoke all permissions for the international sales privilege, meaning that users in this group will not be able to access the folder or its contents. Click **OK** to save these definitions. Later on we can repeat this process to create a folder for international sales materials, thereby creating a hierarchical file system, with multiple branches for various folders and sub-folders.

**Adding Items to the File Explorer (16:40-17:03)**
Now that permissions have been defined for the folders we created, we're going to start adding files to these folders, starting with the company's brochures. To do so, we're going to right-click the "Brochures" folder and select **Import Files** from the drop-down menu. In the dialog box that opens, we'll locate and double-click the desired file to import it onto the server.

**Using Paste & Import (17:04-18:28)**
As we demonstrated earlier when working with attachment forms, you can also copy a file or folder and paste it into the **File Explorer**, at the same time importing it onto the ***Priority*** server, using the **Paste & Import** command. For instance, you can copy one or more MS-Outlook attachments, or even copy an entire folder from the Windows Explorer and paste it, together with all of its contents, directly into ***Priority***'s **File Explorer**.
You can also copy items from the **File Explorer** and paste them into an attachment form, or vice versa. For instance, say you want to attach a couple of these brochures to a sales order. Simply select the desired files and press **Ctrl+C** to copy them to the clipboard. Next, we're going to open the **Sales Orders** form and retrieve a sample sales order with the "Draft" Status, and then move to the **Attachments** sub-level form. Finally, place the cursor in the desired line and press **Ctrl+V** to paste the files, or rather, shortcuts to their location on the server, into this form. If you expand the column to its full width, you'll see that the **File Path**s in this form are identical to the **File Path**s that appear in the **File Explorer**; that is, no duplicate file was created.

**File/Folder Permissions & File Status (18:29-20:10)**
Let's return to the **File Explorer**. Looking over to the side of the **File Explorer** screen for a moment, you can see what permissions you've been assigned for the selected file or folder. Keep in mind, however, that these permissions only apply to the file's current location within the **File Explorer**. If the same file has been linked to one or more form records in ***Priority***, all users with access to the form record can also open the attached file, regardless of the permissions they are assigned in the **File Explorer**. To view a list of any ***Priority*** records - or additional **File Explorer** folders - to which a particular file has been linked, simply right-click the desired file and select **Links to File**. It's also possible to copy a shortcut to the file into another location within the **File Explorer**. Here, too, users who cannot access the file

from its current location may be able to do so from the second location, if they have been granted the necessary permissions.
On the other hand, a file that is locked for editing in *any* system location will only open in read-only mode, regardless of where you access it from. All system files are locked for editing by other users while they are open -- whether opened from an attachment form or from the **File Explorer** -- and then synchronized with the system automatically when closed. The file's status appears in the **Status** column. If the file is in use, you can check the **Locked by** column to see who is currently working with it. If the file in question is listed in your name, you can free it for use by right-clicking the file and selecting **Change Status**.

### Exporting Items from the File Explorer (20:11-20:37)

You may also wish to export a file or folder from the **File Explorer** and save it to your hard disk or network drive. To do so, simply copy it into the Windows Explorer, for instance, using **Ctrl+C** and **Ctrl+V**. Alternatively, you can right-click the relevant item and select **Save** from the drop-down menu. In the dialog box that opens, locate the desired folder, and then click **OK**.

### Organizing Folders & Creating Favorite Links (20:38-21:30)

Once you've added a number of files and folders to the **File Explorer**, you may want to organize things a bit better. You can move items around within the **File Explorer** using basic copy and paste commands, which are available in the upper **Edit** menu or by right-clicking within the **File Explorer**. You can also use the standard keyboard shortcuts: **Ctrl+C** and **Ctrl+V**. Even simpler, you can click and drag any file or folder within the **File Explorer** and then drop it into the desired location. You can also use any of these methods to organize folders within the list at the left of the screen.
You can also add a direct link to any frequently-used folders to your list of **Favorite Links**. To rearrange or edit this list, simply right-click any folder and choose from the available options.

### Designing the File Explorer (21:31-22:10)

You may also want to change the appearance of the **File Explorer**, for maximum efficiency. For instance, you can drag any column to a different location, click on any column title to sort the displayed items by the values in that column, or change the width of any column by placing the cursor on the edge of the column title and dragging it to the desired width.
In addition, you can use the **Arrange Columns** dialog box, accessed via the upper **Design** menu, to hide or rearrange columns to your specifications and to restore columns that were previously hidden.

### Exiting the File Explorer (22:11-22:30)

To exit the explorer, select the **Exit** command from the **File** menu. All of your design definitions will be maintained the next time you open the **File Explorer**.
This concludes our explanation of ***Priority***'s document management tools.

**Related Documentation**

- User Interface Guide
- Collaboration clip