

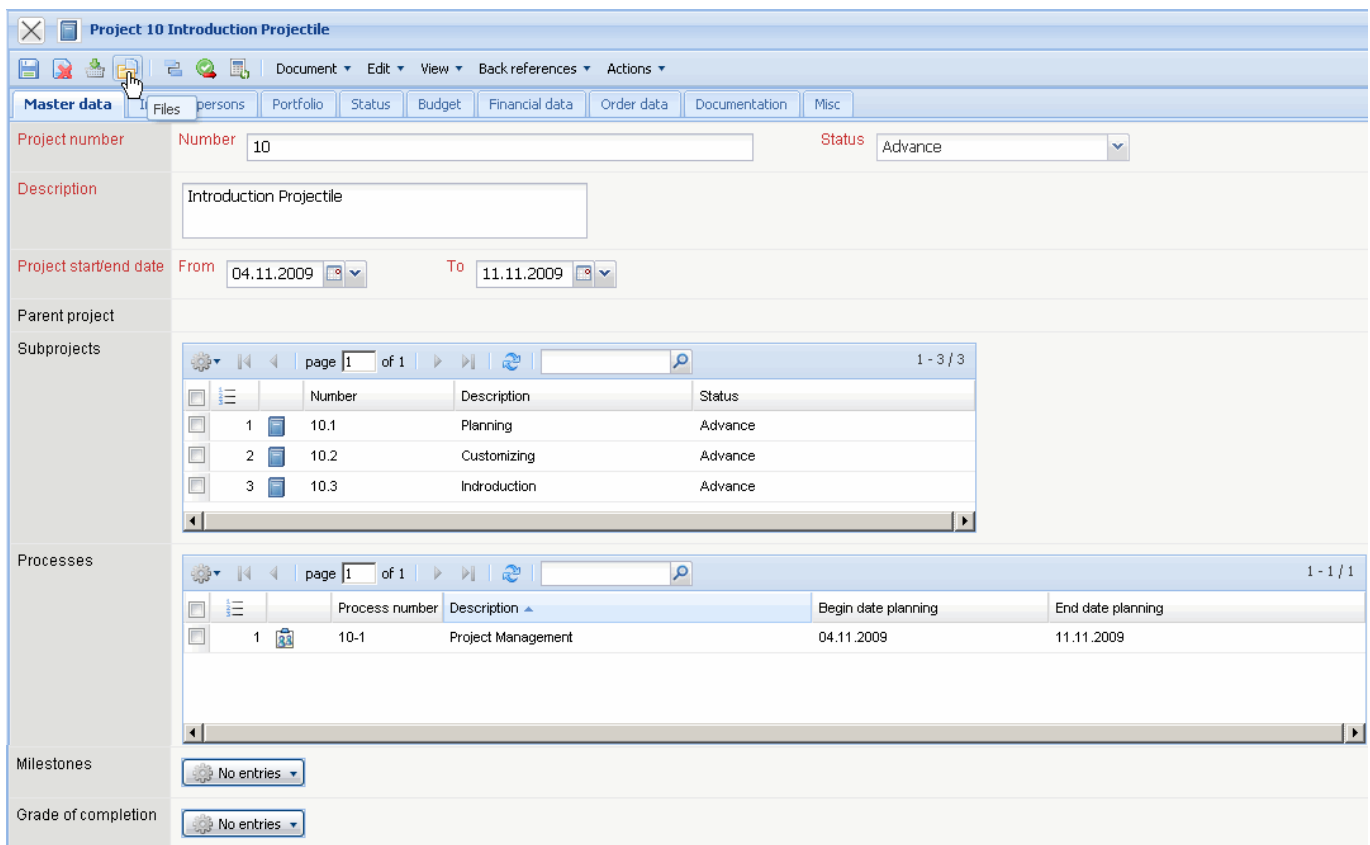
[previous](#) [Home](#) [next](#)

3.04.2 Document Administration "Files"

Projectile contains in the optional Groupware-Module an integrated document administration. By using document administration, index structure can be created in the web-server and files can also be transferred and administrated. The document administration contains personal folders and project folders. This folder-structures are completely liable to the authority of the system.

Accessing Document Administration

Files are either accessed directly from the function bar in the work area or over a project by using the button  (if there are no files in the project folder) or  (if there are files).



The screenshot shows the 'Project 10 Introduction Projectile' web interface. The top navigation bar includes 'Master data', 'Files', 'persons', 'Portfolio', 'Status', 'Budget', 'Financial data', 'Order data', 'Documentation', and 'Misc'. The 'Master data' section contains fields for 'Project number' (10), 'Status' (Advance), 'Description' (Introduction Projectile), 'Project start/end date' (From 04.11.2009 To 11.11.2009), 'Parent project', and 'Subprojects'. The 'Subprojects' section displays a table with 3 entries:

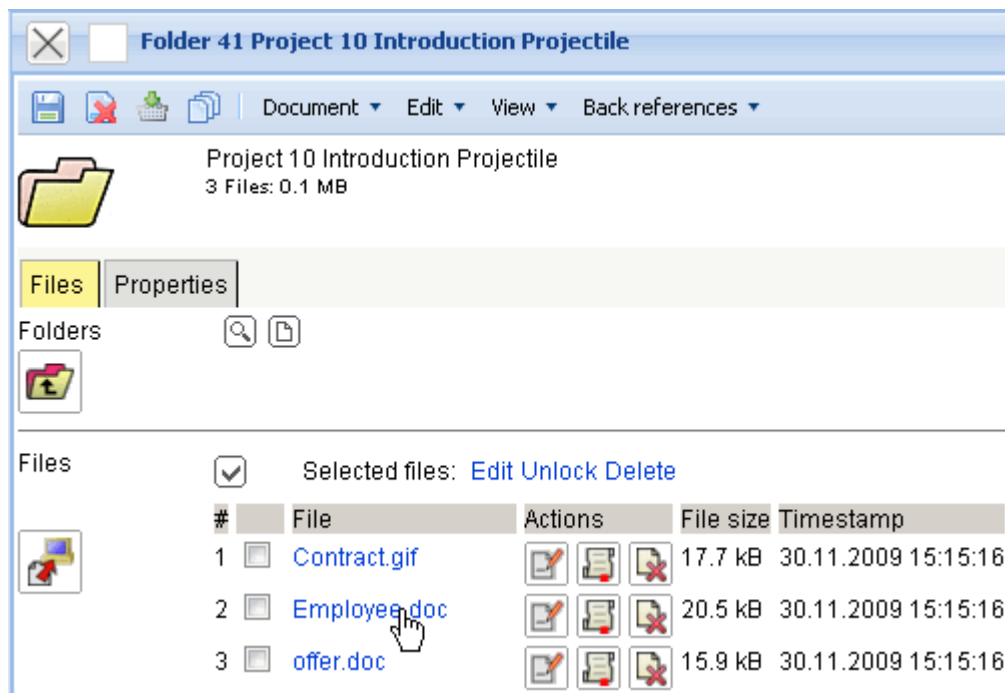
	Number	Description	Status
1	10.1	Planning	Advance
2	10.2	Customizing	Advance
3	10.3	Introduction	Advance

The 'Processes' section displays a table with 1 entry:

	Process number	Description	Begin date planning	End date planning
1	10-1	Project Management	04.11.2009	11.11.2009

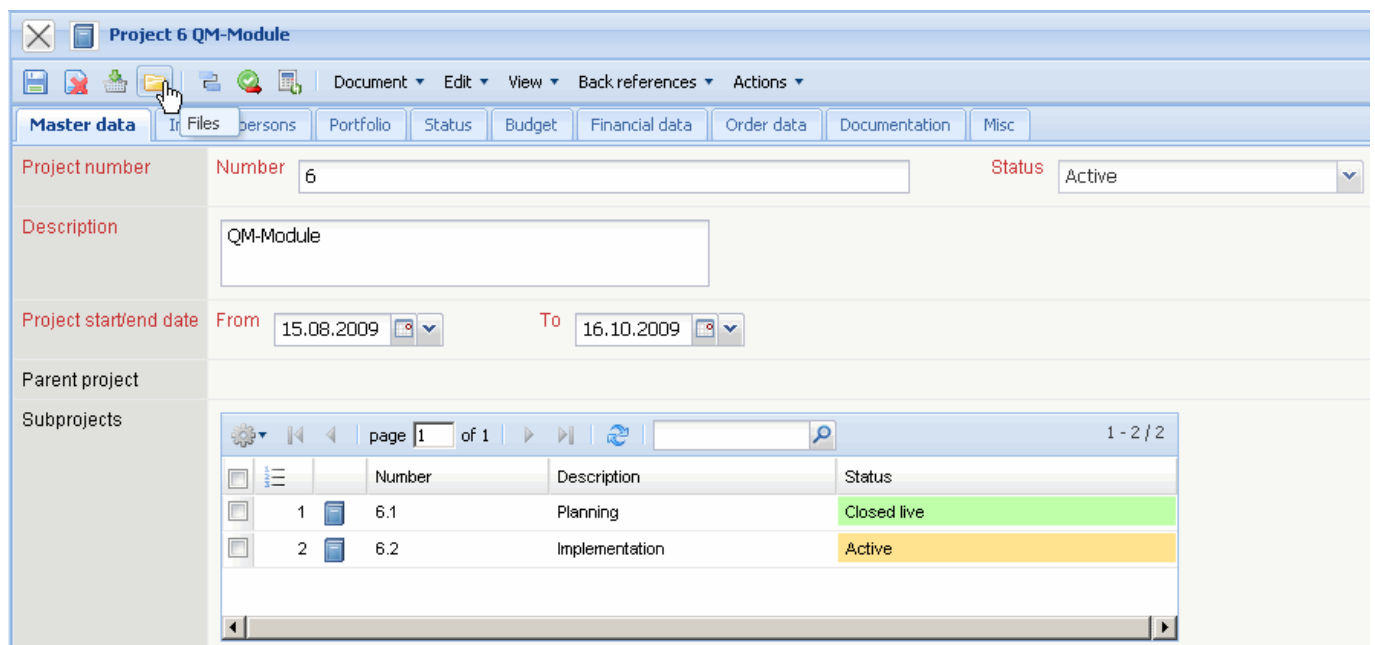
The 'Milestones' and 'Grade of completion' sections both show 'No entries'.

In the example the project folder for the project 10 (Introduction Projectile) opens with three documents.

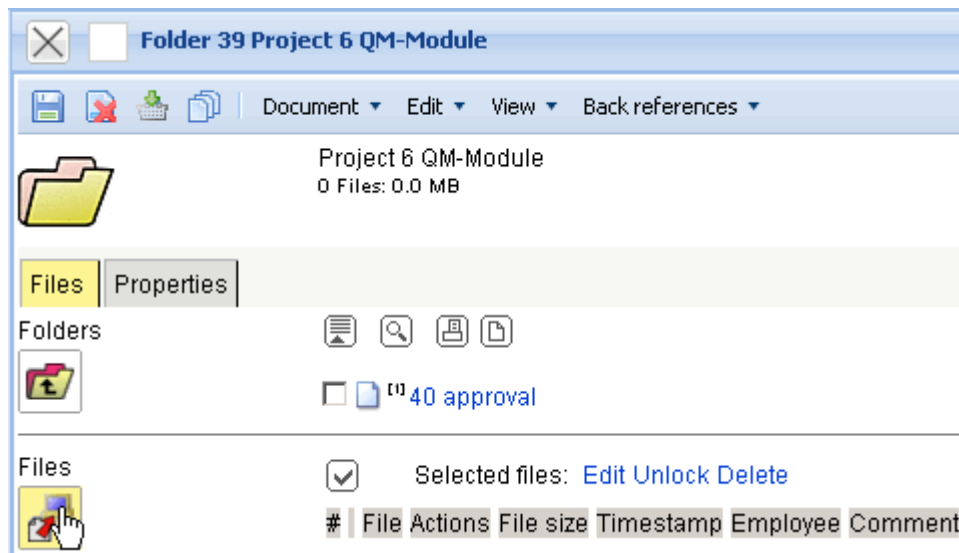


Using document administration

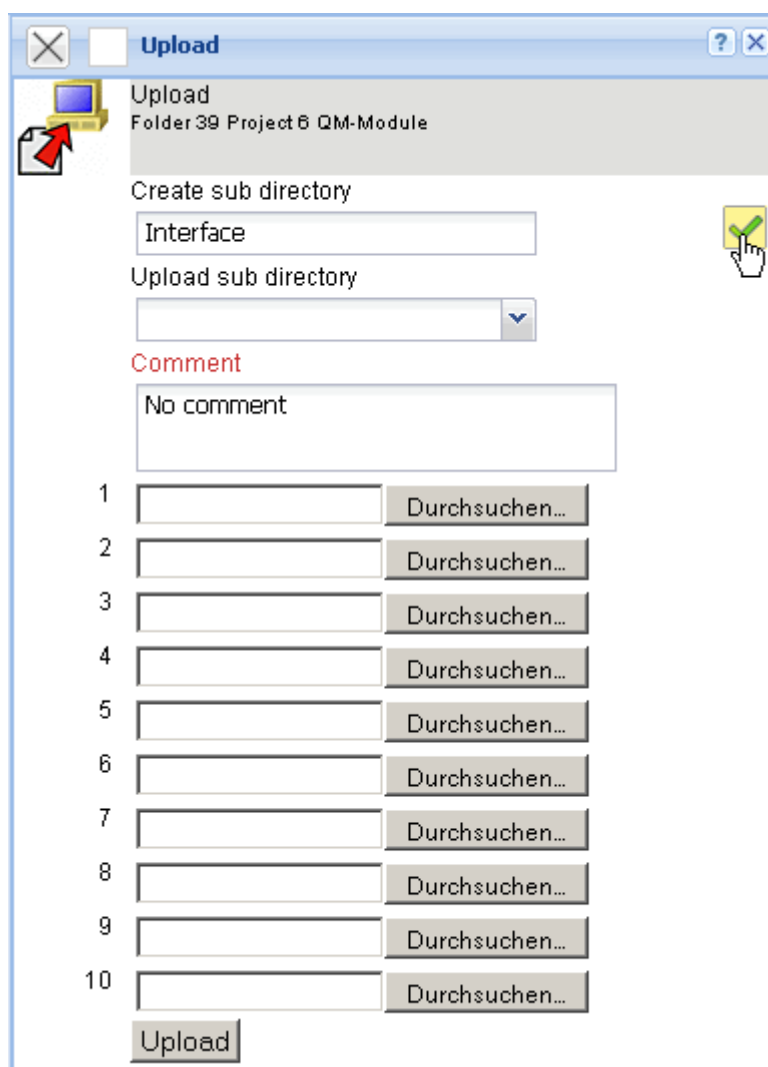
In the following example, four files are copied in the web-server for the project QM-Module by using File .



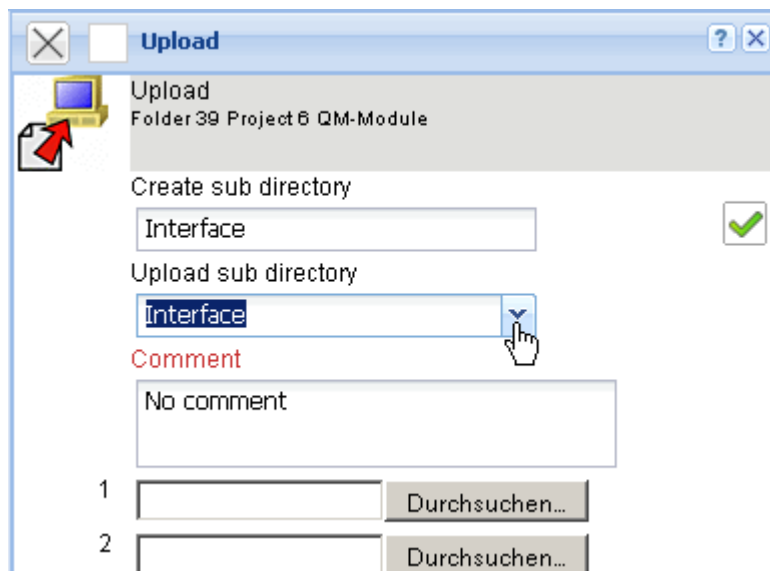
The button "Upload" opens a dialog ...



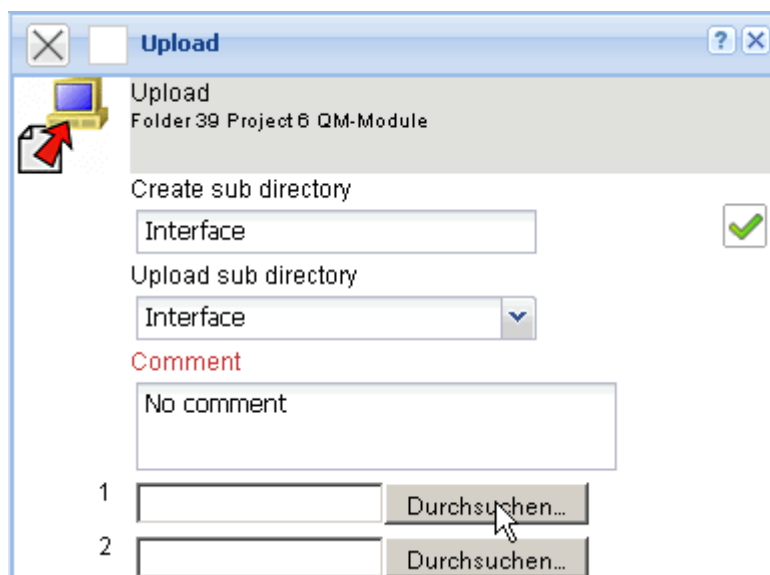
... to choose local files and to copy and administrate them in the web-server. In the upload dialog indexes can be created. In the following example, in the folder of the project ...



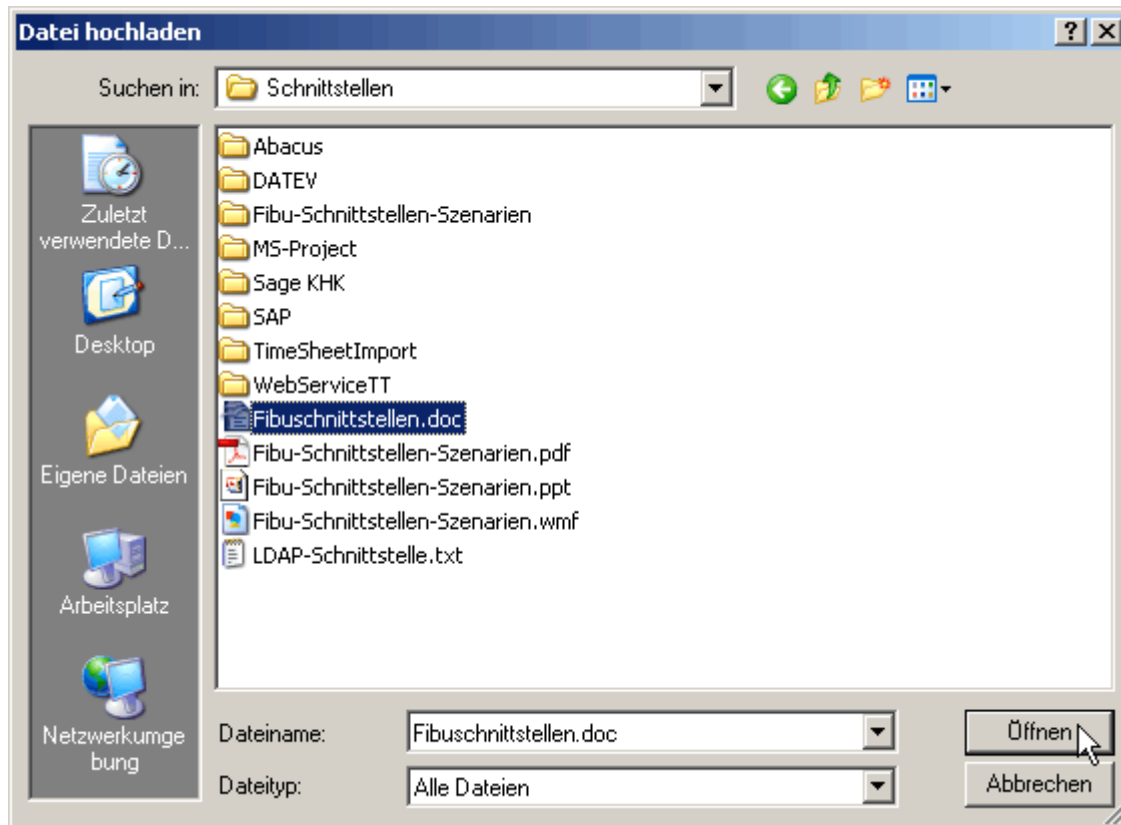
... an index "Interface" is created.



In the new index (Element Upload Directory) any files can be now copied. If this index is not chosen, the selected files are directly copied in the folder. By using the button "Search", files for the upload can be selected in the following step.



At first a standard dialog for opening files is opened.



Afterwards the desired file is marked and it is transferred by clicking on "Open". In the example the file exchange-interface.doc is chosen. Further files can be analogously selected for the upload.

Upload

Folder 39 Project 6 QM-Module

Create sub directory

Interface

Upload sub directory

Interface

Comment

No comment

1 Fibuschnittstellen.doc Durchsuchen...

2 Durchsuchen...

3 Durchsuchen...

4 Durchsuchen...

5 Durchsuchen...

6 Durchsuchen...

7 Durchsuchen...

8 Durchsuchen...

9 Durchsuchen...

10 Durchsuchen...

Upload

After this selection, the copying process is operated with “Upload”. The selected files are transferred by the system into the web-server in the folder (or into the associated index).

Upload

Folder 39 Project 6 QM-Module

Create sub directory

Interface ☒

Upload sub directory

Interface

Comment

No comment

1	Fibuschnittstellen.doc	Durchsuchen...
2	LDAP-Schnittstelle.txt	Durchsuchen...
3	Schnittstelle-Sage.doc	Durchsuchen...
4	SAP-Schnittstelle.doc	Durchsuchen...
5		Durchsuchen...
6		Durchsuchen...
7		Durchsuchen...
8		Durchsuchen...
9		Durchsuchen...
10		Durchsuchen...

Upload

The folder of the project 6 QM-Module contains four files now. The transfer of the files into the web-server is journalized accordingly .

Folder 39 Project 6 QM-Module

4 Files were successfully uploaded
[Hide these messages](#)

File 'Fibuschchnittstellen.doc' was successfully loaded up and renamed to 'Interface/Fibuschchnittstellen.doc'
 File 'LDAP-Schnittstelle.txt' was successfully loaded up and renamed to 'Interface/LDAP-Schnittstelle.txt'
 File 'Fibu-Schnittstelle-Sage.doc' was successfully loaded up and renamed to 'Interface/Fibu-Schnittstelle-Sage.doc'
 File 'Beispiele SAP-Schnittstelle.doc' was successfully loaded up and renamed to 'Interface/Beispiele SAP-Schnittstelle.doc'

Document ▾ Edit ▾ View ▾ Back references ▾

Project 6 QM-Module
4 Files: 0.6 MB

Files | **Properties**

Folders

☐ 40 approval

Files
☒ Selected files: [Edit](#) [Unlock](#) [Delete](#)

#	File	Actions	File size	Timestamp	Employee	Comment
1	Interface/Beispiele SAP-Schnittstelle.doc		259.0 kB	30.11.2009 16:48:06	Conner Jane	No comment
2	Interface/Fibu-Schnittstelle-Sage.doc		77.5 kB	30.11.2009 16:48:06	Conner Jane	No comment
3	Interface/Fibuschchnittstellen.doc		219.5 kB	30.11.2009 16:48:06	Conner Jane	No comment
4	Interface/LDAP-Schnittstelle.txt		9.9 kB	30.11.2009 16:48:06	Conner Jane	No comment

Files, which are not needed in Files, can be deleted with . In the example the file Parameter.xls ist marked and ...

Folder 39 Project 6 QM-Module

4 Files were successfully uploaded
[Hide these messages](#)

File 'Fibuschchnittstellen.doc' was successfully loaded up and renamed to 'Interface/Fibuschchnittstellen.doc'
 File 'LDAP-Schnittstelle.txt' was successfully loaded up and renamed to 'Interface/LDAP-Schnittstelle.txt'
 File 'Fibu-Schnittstelle-Sage.doc' was successfully loaded up and renamed to 'Interface/Fibu-Schnittstelle-Sage.doc'
 File 'Beispiele SAP-Schnittstelle.doc' was successfully loaded up and renamed to 'Interface/Beispiele SAP-Schnittstelle.doc'

Document ▾ Edit ▾ View ▾ Back references ▾

Project 6 QM-Module
4 Files: 0.6 MB

Files | **Properties**

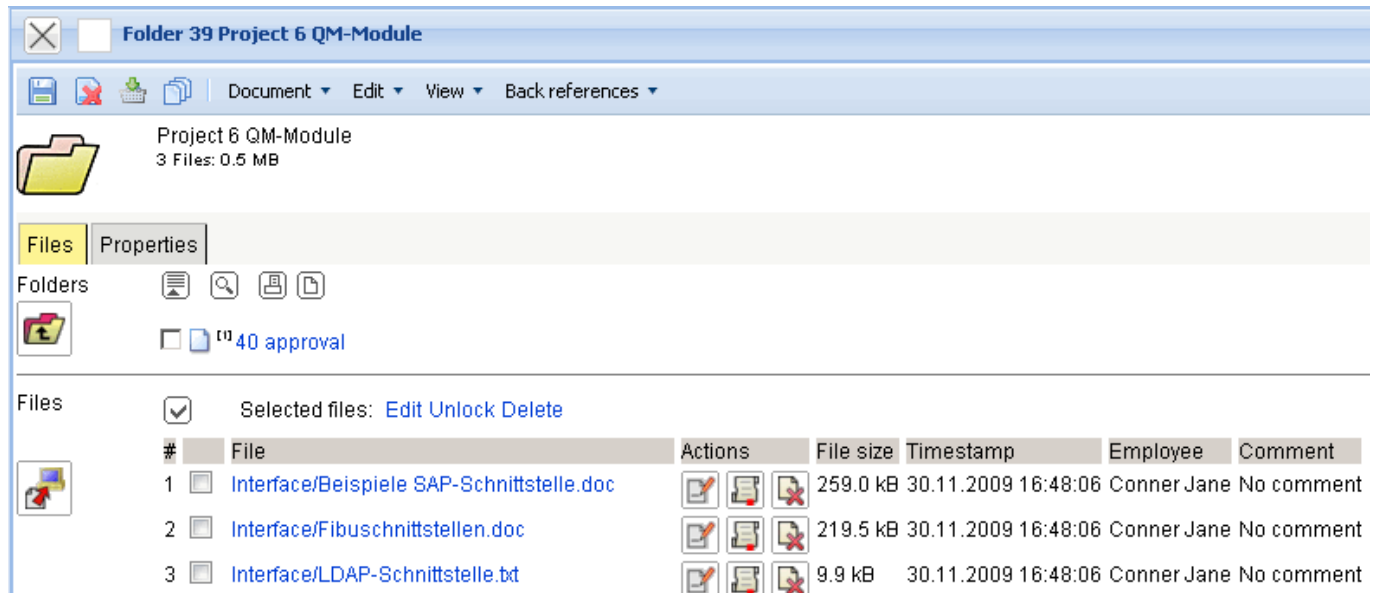
Folders

☐ 40 approval

Files
☒ Selected files: [Edit](#) [Unlock](#) [Delete](#)

#	File	Actions	File size	Timestamp	Employee	Comment
1	Interface/Beispiele SAP-Schnittstelle.doc		259.0 kB	30.11.2009 16:48:06	Conner Jane	No comment
2	Interface/Fibu-Schnittstelle-Sage.doc		77.5 kB	30.11.2009 16:48:06	Conner Jane	No comment
3	Interface/Fibuschchnittstellen.doc		219.5 kB	30.11.2009 16:48:06	Conner Jane	No comment
4	Interface/LDAP-Schnittstelle.txt		9.9 kB	30.11.2009 16:48:06	Conner Jane	No comment

... deleted out of the File.



Folder 39 Project 6 QM-Module

Project 6 QM-Module
3 Files: 0.5 MB

Files | Properties

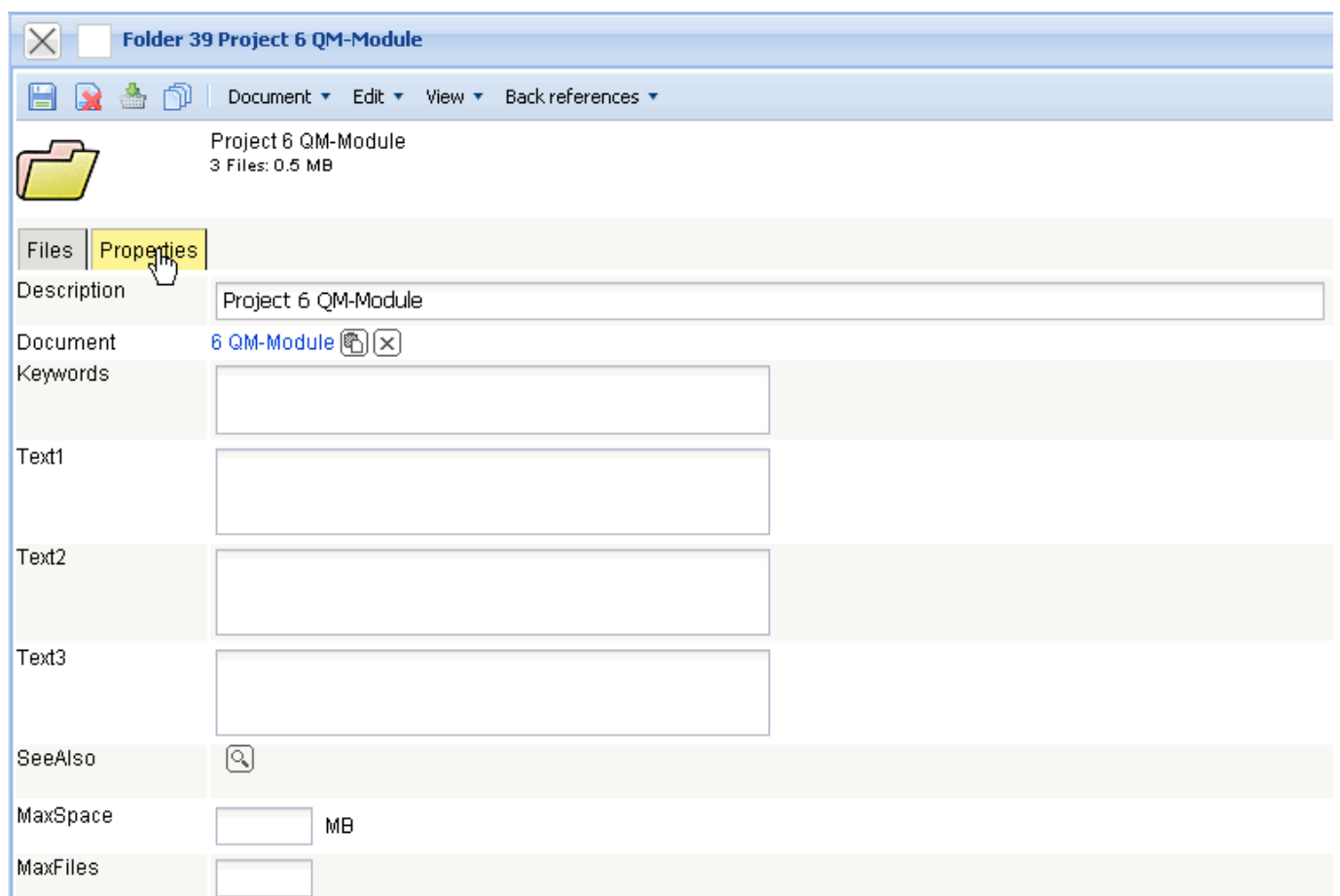
Folders

Files

Selected files: [Edit](#) [Unlock](#) [Delete](#)

#	File	Actions	File size	Timestamp	Employee	Comment
1	Interface/Beispiele SAP-Schnittstelle.doc		259.0 kB	30.11.2009 16:48:06	Conner Jane	No comment
2	Interface/Fibuschnittstellen.doc		219.5 kB	30.11.2009 16:48:06	Conner Jane	No comment
3	Interface/LDAP-Schnittstelle.txt		9.9 kB	30.11.2009 16:48:06	Conner Jane	No comment

In the link characteristics the files can be provided and described with keywords.



Folder 39 Project 6 QM-Module

Project 6 QM-Module
3 Files: 0.5 MB

Files | **Properties**

Description: Project 6 QM-Module

Document: [6 QM-Module](#)

Keywords:

Text1:

Text2:

Text3:

SeeAlso:

MaxSpace: MB

MaxFiles:

Moreover, so-called quotas can be assigned. Quotas limit the number of files per folder and the disk space

✕

Folder 39 Project 6 QM-Module



Document ▾ Edit ▾ View ▾ Back references ▾

Save the document 6 QM-Module

3 Files: 0.5 MB

Files Properties

Description

Project 6 QM-Module

Document

6 QM-Module  

Keywords

CO, SD, FI, HR, PS, Contacts, Costs, Invoices, Applications, Appointment

Text1

Documents for the MS Exchange-Server- and SAP-Interfaces

Text2

Text3

SeeAlso



MaxSpace

5

 MB

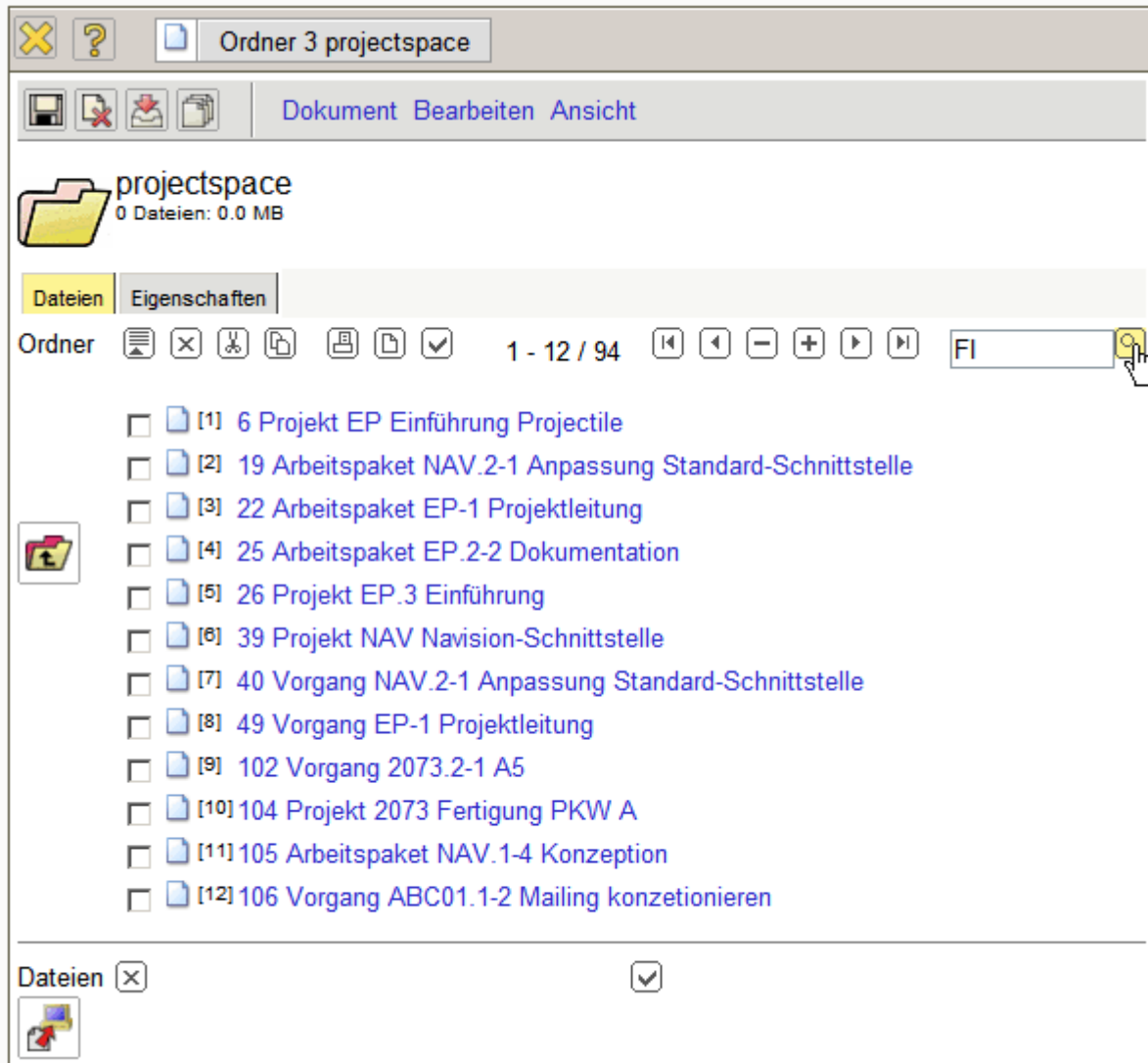
MaxFiles

20

The documents, which are administrated in the Files, can usually be opened directly or stored locally.

Note: Depending on the operating system and used browser, some file types can not be displayed usefully (in MS Internet Explorer for example CSV- and MS Project-Files).

In Files a folder-structure can also be searched by using the magnifying glass.



All file names and characteristics (key-words, descriptions,...) are searched. The administrated files can not be searched by the contents.

Liste bearbeiten ablegen Report			
1 - 2 / 2			
		Nummer	Bezeichnung
1	☐	162	Projekt 36 Einführung Fibu
2	☐	234	Projekt 92 QM-Modul
=		396	

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