

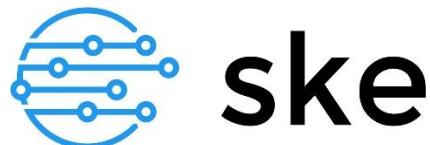
# DocumentViewer

## Manual of Features

Developed by:  
SKE Inc.

[www.skeinc.com](http://www.skeinc.com)  
[info@skeinc.com](mailto:info@skeinc.com)

December 2025



## Contents

<b>1</b>	<b>INTRODUCTION.....</b>	<b>3</b>
<b>2</b>	<b>BROWSERS, DEVICES AND FUNCTIONS.....</b>	<b>4</b>
<b>3</b>	<b>MODES OF OPERATION .....</b>	<b>6</b>
<b>4</b>	<b>DOCUMENTVIEWER USER INTERFACE .....</b>	<b>7</b>
	LAYOUT.....	7
	NAVIGATING WITH + AND - .....	8
	THUMBNAIL VIEW / DETAILS VIEW .....	9
	FOLDERS AND DOCUMENTS PANE FUNCTIONS .....	10
	HELP.....	11
<b>5</b>	<b>DOCUMENT FUNCTIONS .....</b>	<b>12</b>
	DOCUMENT FUNCTIONS OVERVIEW.....	12
	CHECK-OUT DOCUMENT .....	14
	CHECK-IN DOCUMENT .....	14
	COPY / MOVE DOCUMENT .....	14
	RENAME DOCUMENT .....	15
	UPDATE DOCUMENT .....	15
	MANAGE METADATA INFORMATION .....	17
<b>6</b>	<b>FOLDER FUNCTIONS OVERVIEW .....</b>	<b>19</b>
<b>7</b>	<b>FOLDER FUNCTIONS WITHIN THE FOLDER PANE .....</b>	<b>21</b>
	CREATE SUBFOLDER .....	21
	<i>Clone Folder Structure</i> .....	21
	RENAME FOLDER .....	21
	DELETE FOLDER .....	22
	DOWNLOAD FOLDER.....	22
	MANAGE USER NOTIFICATIONS .....	23
	MANAGE FOLDER SECURITY .....	27
	DETERMINING USER ACCESS .....	29
<b>8</b>	<b>FOLDER FUNCTIONS WITHIN THE DOCUMENTS PANE .....</b>	<b>32</b>
	ADD DOCUMENTS .....	32
	FOLDER/DOCUMENT URL .....	34
	KEYWORD SEARCH .....	35
	MANAGE CHECK-OUTS .....	36
	SORT DOCUMENTS .....	37
	RESTRICTIONS.....	38
	TECHNICAL DOCUMENTATION.....	41
	Folder Hierarchy.....	41

## 1 Introduction

DocumentViewer provides secure cloud-based file management and reporting capabilities, enabling easy publishing of and access to your organization's files; i.e. Word, PDF, PowerPoint, image, multimedia, CAD, etc. files.

**DocumentViewer** is a core end-user application of **GeoPortal**. The other core applications are:

- **GeoViewer** – providing map-based business information integration and access; and,
- **DataViewer** – providing business data query and reporting.

DocumentViewer is often integrated with custom business applications and other file/document management systems to provide a seamless work environment from the creation of a document to its publishing, access and use.

**Note:** The terms “files” and “documents” are used interchangeably.

## 2 Browsers, Devices and Functions

DocumentViewer supports the following browsers (latest version only) in both a desktop and mobile (where indicated) computing environment:

- MS Edge
- Google Chrome (mobile and desktop)
- Apple Safari (mobile and desktop)
- Firefox

**Note:** the user interface and available functionality will change depending on the following:

1. Size of display. On mobile devices the interface will look and work differently because of the limited screen size.
2. User account role. The functions available to a user will depend on their GeoPortal account role. On mobile devices this is further limited primarily for the administrative functions, as the screen size limits functionality and usability.

**Technical Note:** DocumentViewer uses GeoPortal's Dynamic Access System (DAS) for defining user roles and security level

We refer to **desktop** and **mobile** environments. Mobile includes any device whose display uses its full screen (100% viewport) – such as a Smart Phone, or tablet such as an Apple iPad. Tablet PCs are not mobile devices and will behave like a desktop device, for example a Microsoft Surface.

The following table identifies the function availability by device and role:

Function	Desktop	Mobile	User	Editor	Admin
Keyword Search	Yes	Yes	Yes	Yes	Yes
Create Subfolder	Yes	Yes			Yes
Clone Folder Structure	Yes	No			Yes
Delete Folder	Yes	Yes			Yes
Download Folder	Yes	Yes	Yes	Yes	Yes
Rename Folder	Yes	Yes			Yes
Manage User Notifications	Yes	No	Yes (own)	Yes (own)	Yes (All)
Manage Folder Security	Yes	No			Yes (All)
Add Document	Yes	Yes		Yes	Yes

Download Document	Yes	Yes	Yes	Yes	Yes
Archive/Delete Document	Yes	Yes		Yes	Yes
Copy/Move Document	Yes	Yes		Yes	Yes
Rename Document	Yes	Yes		Yes	Yes
Update Document	Yes	Yes		Yes	Yes
Manage Metadata Information	Yes	Yes		Yes	Yes
Folder/Document URL	Yes	Yes	Yes	Yes	Yes
Check Out/In Document	Yes	Yes		Yes	Yes
Undo Check Out	Yes	No			Yes
Manage Check-outs	Yes	No			Yes
Thumbnail View	Yes	Yes	Yes	Yes	Yes
Sort	Yes	Yes	Yes	Yes	Yes

### 3 Modes of Operation

DocumentViewer can work in two modes:

**Application Mode** – When DocumentViewer is used in Application Mode, another business application is directing its use. Typically, the business application/DocumentViewer interaction causes the user to perform a pre-defined file management transaction, e.g., add a file in a specific folder that is related to that application. In this instance, DocumentViewer's functionality is restricted to that particular transaction, and other functionality and documents wouldn't be visible or available.

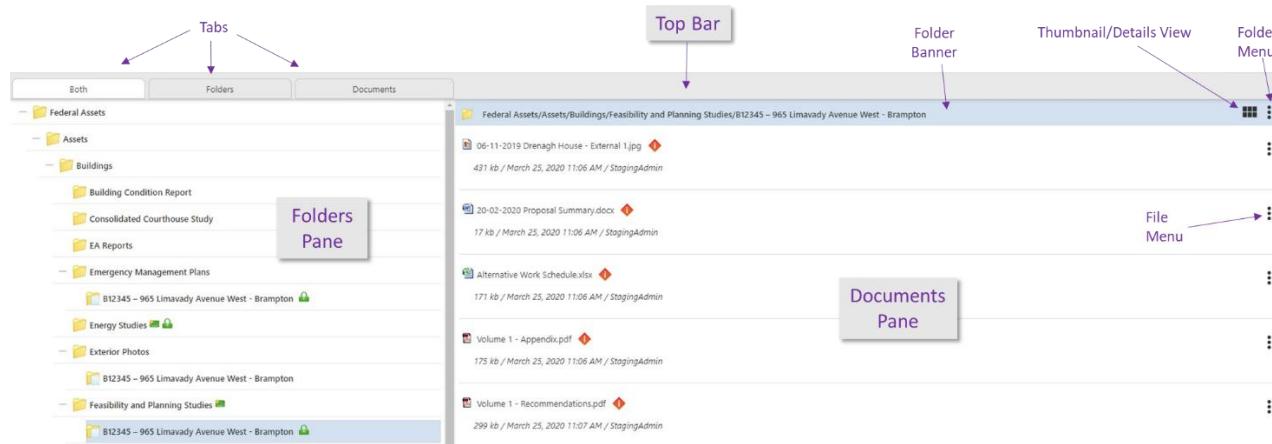
**Generic Mode** – When DocumentViewer is launched directly from a home page or the other GeoPortal core applications it is in Generic Mode and the functionality available depends only on the user's role. Generic mode is used primarily for browsing folders, and searching for and accessing files.

**Note:** Unless otherwise stated, the help documentation addresses the use of DocumentViewer in Generic Mode. However, there is no difference in functionality or display. All connections and datasets that the user has access to are available, as are functions.

## 4 DocumentViewer User Interface

### Layout

The interface has three areas: the Top Bar; the Folders Pane on the left side, and the Documents Pane on the right side.



1. The **Top Bar** shows:

- In the top left area three tabs for managing the display, consisting of:
  - Both** – shows both folders and files, which is the default mode for desktop environments. This option is not available when DocumentViewer is used on a mobile device (see image below).
  - Folders** – only shows the folders, which is the default mode on mobile devices.
  - Documents** – only shows the files for the selected folder.

2. The **Folders Pane** (left frame) shows the full folder hierarchy available to the user, based on their account role. Also, the folders can have additional properties set on them including:

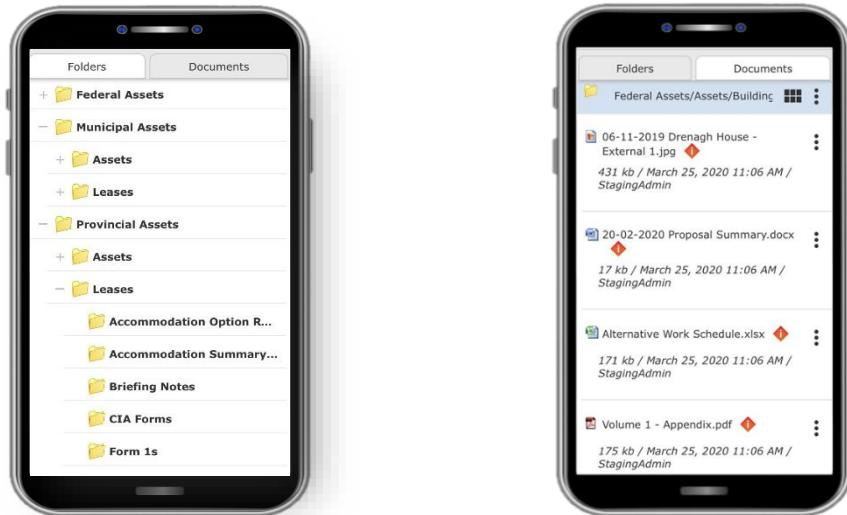
- ( ) Notify Users - when email notifications have been set for that folder and sub-folders.
- ( ) Folder Contents – when the folder contains one or more files.
- ( ) Folder Security – when the folder has folder and sub-folder access control. By default, all users are given access to the root folder, however, the Administrator can then refine access to the root and sub-folders.

3. The **Documents Pane** (right frame) shows the following:

- Along the top there is a light blue bar (folder banner) which displays the name of the current selected folder, and on the far right a toggle button for thumbnail or details view ( ), and a folder menu icon [:] to bring up a menu with specific folder functions.
- Below the selected folder bar, all the files in the folder are shown, along with the following information for each file:

- A file type icon. DocumentViewer recognizes common file types, e.g., Word, PowerPoint, .pdf, .jpg, etc.
- Name – the file name.
- Indexed - the “i” icon ( ⓘ) is present if the file is indexed.
- Checked out – the “checked out” icon ( ➔) is present if the file is checked out.
- Size – the file size in Kb / Mb.
- Modified – the date file was added/updated. This is always the latest version of the file. If multiple versions of a file are created over time, the other versions are stored in the corresponding “(archive)” folder.
- Owner – the “account username” of the person who added/updated the file.

In the details view on the far right of each record click the File menu icon [:] to bring up a menu with specific file functions.



### Navigating with + and -

The ‘+’ icon to the left of a folder is used for exploring the folder hierarchy within the Folders Pane or in a form when a function requires the user to browse for a folder (e.g. Copy/Move Document). Use these icons to navigate the hierarchy without selecting a particular folder.

If there are no subfolders then there is no ‘+’ to the left of the folder name. Once subfolders are revealed the + changes to a ‘-’ beside the parent folder name. Selecting the ‘-’ will collapse and hide the subfolders again.

When the required folder is found, clicking on the folder name will highlight the background of the folder name in light blue.

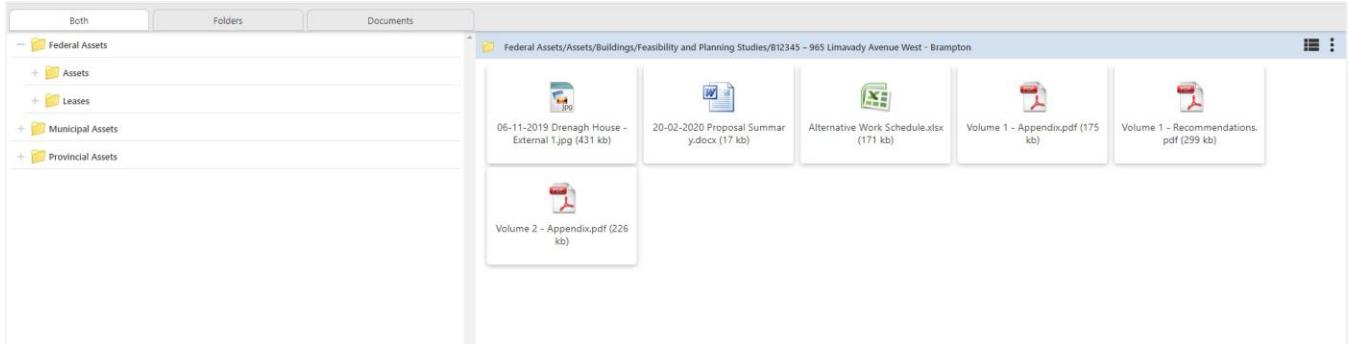
On the desktop, if the user has clicked on the Folders Tab, then either the Both or Documents Tab has to be selected to display the folder contents. On a mobile device selecting the folder will automatically open the Documents Tab.

## Thumbnail View / Details View

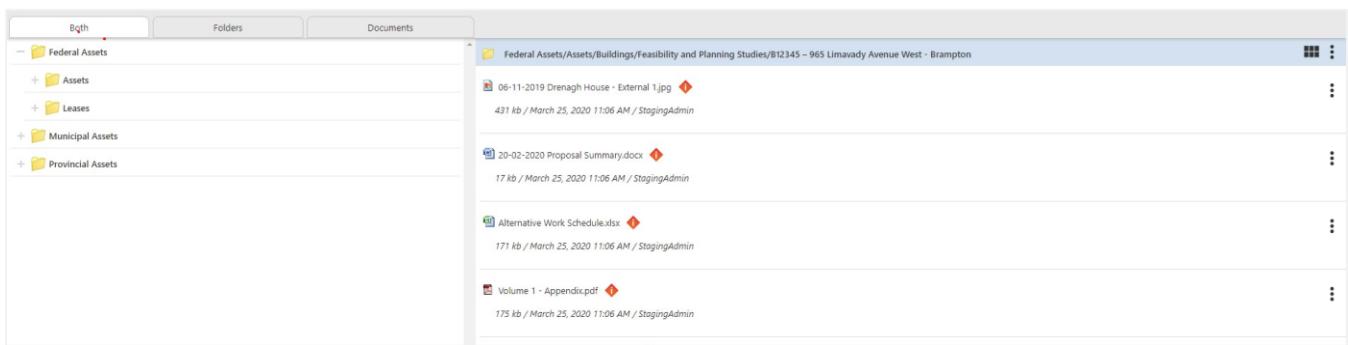
The Thumbnail View / Details View button toggles the way files are shown/listed.



When in “Thumbnail” View mode (grid of squares), the frame shows the type of file and its name.



The default **Details View** provides a more familiar listing of files in the folder, including name, size, date and owner information. When in “Details” View mode (list of squares) the following is displayed:

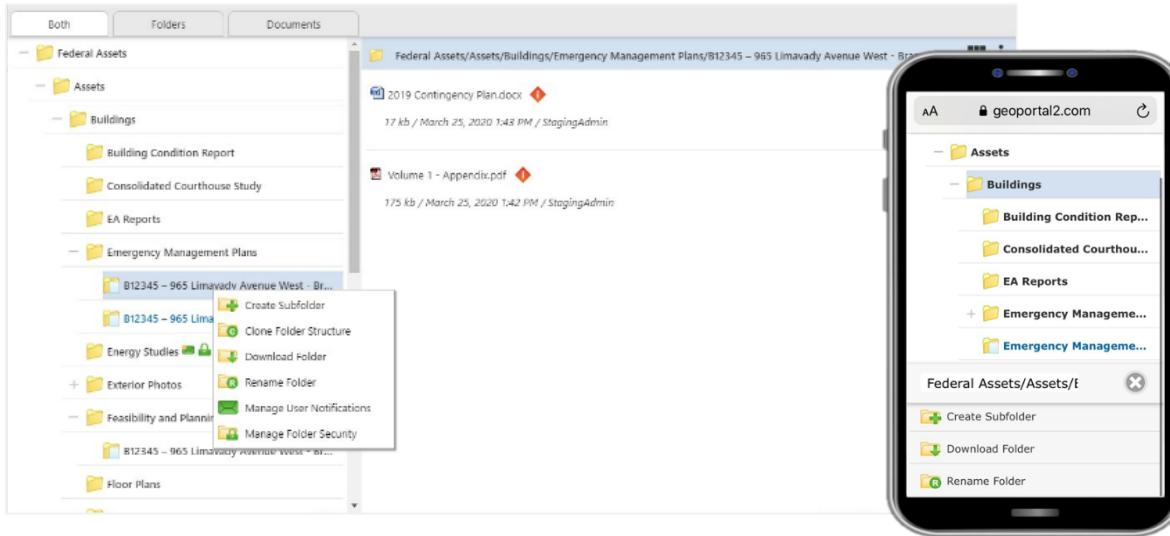


## Folders and Documents Pane Functions

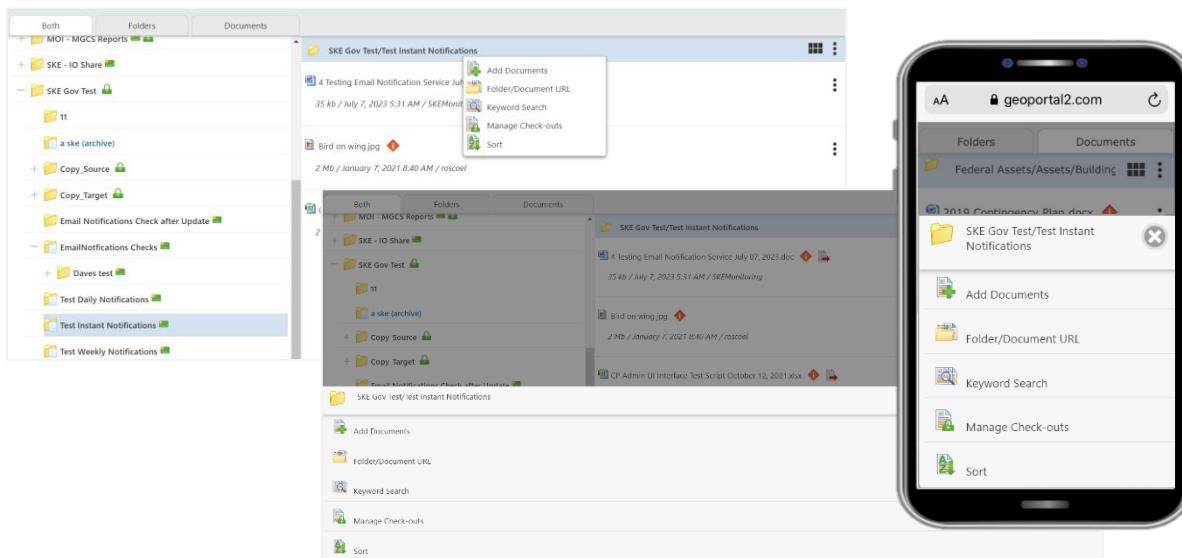
DocumentViewer provides functions based on the Frame you are in and the device you are using.

Accessing the Folders and Documents Pane functions can be done in the following ways:

1. **Folders Pane** – To access folder specific functions: If using a mouse right click on the selected folder name and a menu with folder functions will appear. If using a mobile device press and hold finger on the folder and a menu with folder functions will appear at the bottom of the display.

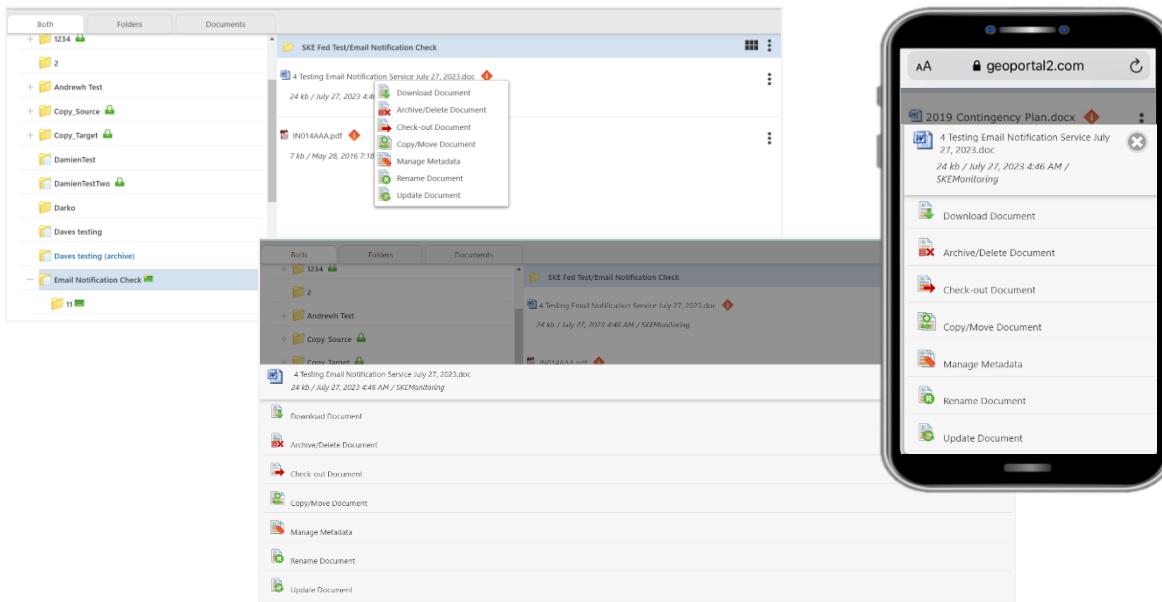


2. **Documents Pane for Selected Folder** - to access the selected folder functions: If using a mouse right click on the selected folder name in the folder banner (light blue bar), and a menu with specific selected folder functions will appear. You can also click or press the ellipsis icon [...] on far right of the folder banner (light blue bar) and a menu will appear at the bottom of your display, for both mobile and desktop environments.



**Note:** Right-clicking or pressing and holding to bring up a menu is not available in the Documents Pane on the mobile interface. You must click on the ellipsis [:] on the far right.

3. **Documents Pane for Selected File** - to access file-specific functions: If using a mouse right-click anywhere on the file record and a menu with specific file functions will appear. You can also click or press the ellipsis icon [:] on the far right of the file record and a menu with specific file functions will appear at the bottom of your display for both mobile and desktop environments.



**Note:** Right-clicking or pressing and holding to bring up a menu is not available in the Documents Pane on the mobile interface. You must click on the ellipsis [:] on the far right.

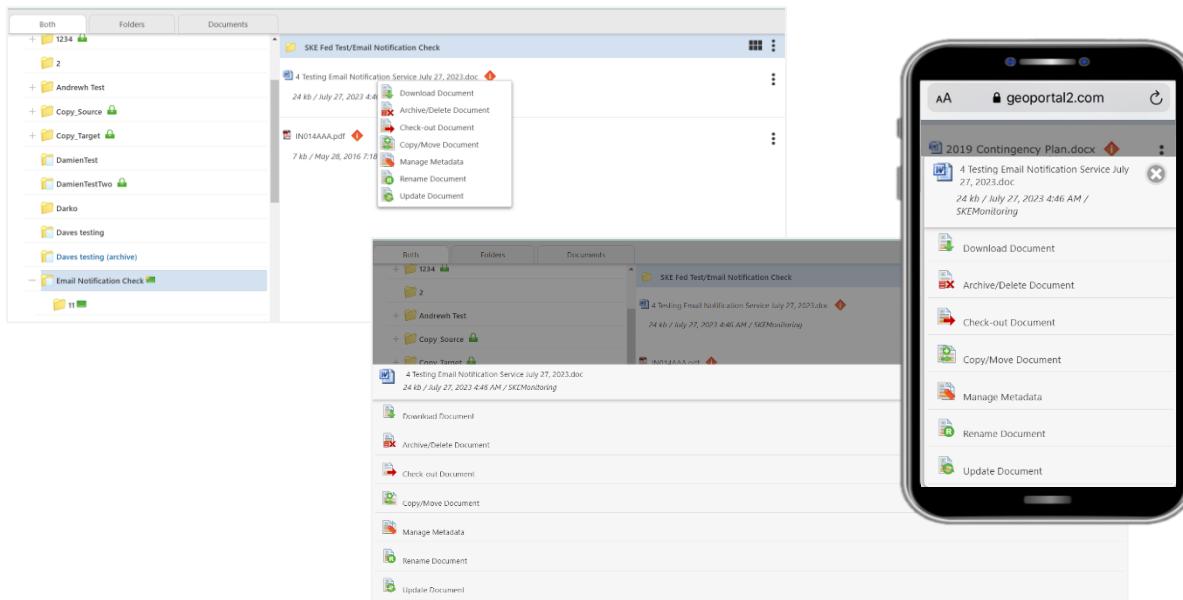
## Help

Help is accessible via the Support page (<https://staginggeoportal.com/IO/documentviewer-en.html>). This page contains useful information and other support resources including a quick tips guide and this manual.

## 5 Document Functions

### Document Functions Overview

If using a mouse right click anywhere on the file record and a menu with specific file functions will appear. You can also click or press the ellipsis icon [:] on the far right of the file record and a menu with specific file functions will appear at the bottom of your display for both mobile and desktop environments.



**Note:** Right-clicking or pressing and holding to bring up a menu is not available in the Documents Pane on the mobile interface. You must click on the ellipsis [:] on the far right.

The available file functions are: Download Document, Archive/Delete Document, Check-out/Check-in Document, Copy/Move Document, Rename Document, and Update Document. Manage Metadata is also available for indexed folders for Editors and Administrators. Indexing is a setting done by SKE Inc. and is specifically agreed upon by the client. It enables user metadata to be added, which includes information beyond file name, size, type, date of upload, and user that uploaded the file (this is considered as system metadata, and is automatically captured for all files).

#### Download Document

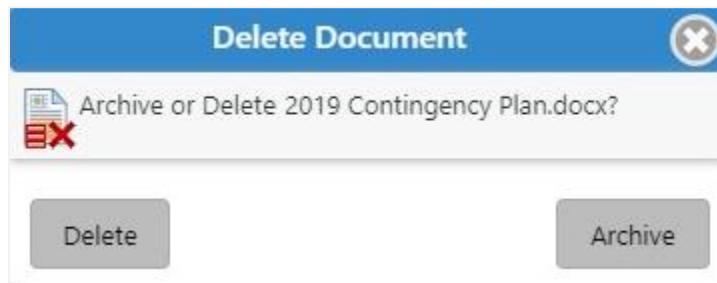
The Download Document function allows you to download and view a file. It is available for **all roles** for both **desktop** and **mobile** environments. If using a mouse double-click on a file name to start the download; or, click the ellipsis icon [:] and a menu for that document will appear at the bottom of the display; or, right-click on the file record (desktop only) and a menu for that document will appear. Select the **Download Document** function. This will start a browser file download along with progress/status.

## Archive / Delete Document

The Archive / Delete File function is available to an **Editor** and **Administrator** for both **desktop** and **mobile** environments. Archive and Delete are different.

The Archive function creates a saved version of the file in its current state in a related “(archive)” folder which is placed beneath the current selected folder. Delete permanently removes the file from the DocumentViewer database.

To **Archive** a file, click the ellipsis icon [:] and a menu for that document will appear at the bottom of the display; or right-click on the file record (desktop only) and a menu for that document will appear. Select the **Archive / Delete Document** function which will launch the associated form prompting you to Delete or Archive. If you click Archive the file will be added to the “(archive)” folder if it exists; or, if no folder exists, one will be created and the file will be added. If a file of the same name already exists in the archive folder; then this file will be added as a more recent “version” and the previous version is renamed, i.e., all versions in an archive are kept.



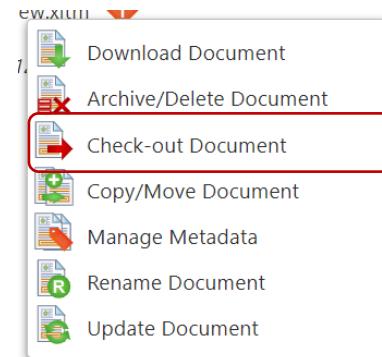
To **Delete** a file, select it and click the **Archive / Delete Document** button. Then click Delete.

If you delete an archived document then all archived versions of that document are deleted automatically.

**Note:** In Application Mode, when a related business system requests that the system archive the contents of a folder, DocumentViewer will first check to see if the Archive folder already exists. If it does not then it will create it. It then moves all the corresponding active documents into the archive folder and deletes them from the active folder. If there are no other documents in the active folder, it will also remove the active folder. In this case, the user does not see the DocumentViewer interface. This capability allows the document database to stay in sync with the business dB, i.e., if a business object is archived or removed, then the corresponding documents should also be archived in DocumentViewer.

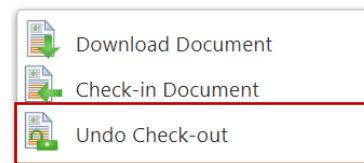
## Check-Out Document

Editors and Admin can Check-out a document in DocumentViewer. This allows them to notify others that they are working on a document. This is intended to prevent users from working on a document at the same time resulting in the loss of work or conflicting versions. To Check-out a document, click the ellipsis icon [:] and a menu for that document will appear at the bottom of the display; or right-click on the file record (desktop only) and a menu for that document will appear. Select **Check-out Document**.



A prompt will appear asking if you would like to download the document. **Select Ok to download or select the X to not download.** A small icon  indicating the document has been checked out will appear beside the document name in DocumentViewer.

A Check-out can be undone by clicking on the ellipsis icon or right-clicking on the document and selecting **Undo Check-out**.

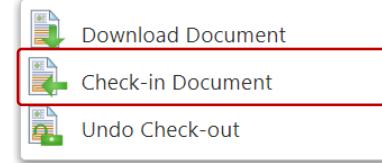


Editors can only undo the check-out of documents that they personally checked out. Admin can undo the check-out of all documents (see Manage Check-outs). Please note that when there are shared folders across GeoPortal instances, the document check-out/check-in capability is not available because of the cross GeoPortal user access.

## Check-In Document

Editors and Admin can Check-in a document in DocumentViewer that they personally checked out.

To Check a document back in, click the ellipsis icon [:] and a menu for that document will appear at the bottom of the display; or right-click on the file record (desktop only) and a menu for that document will appear. Select **Check-in Document**.



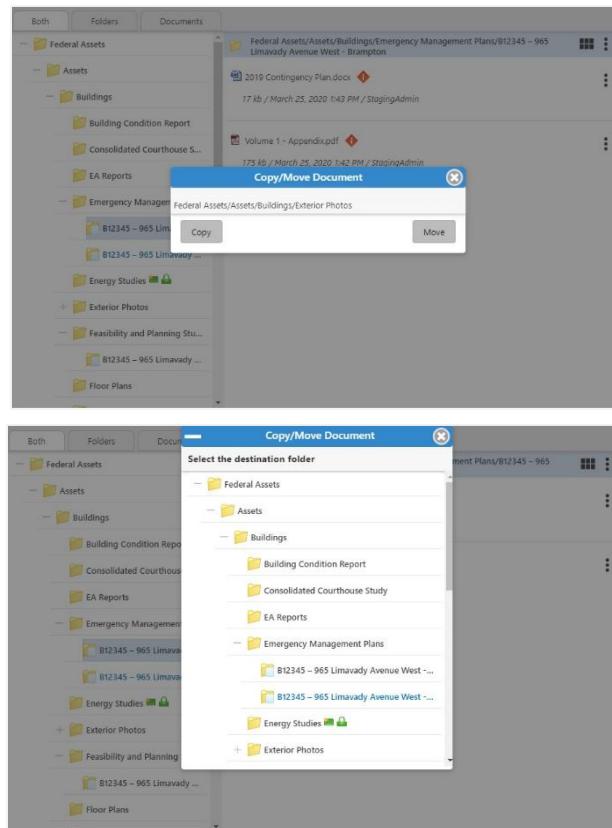
A pop-up will appear allowing you to browse and select a document to upload as the new version.

## Copy / Move Document

The Copy / Move Document function is available to an **Editor** and **Administrator** for both **desktop** and **mobile** environments. It enables you to copy or move one file at a time from their current folder to another existing folder.

The function is available when a file is selected within a folder. If there are no documents in the folder (or if the folder is an archive folder), then the function is not available.

To Copy / Move a file, click the ellipsis icon [:] and a menu for that document will appear at the bottom of the display; or right-click on the file record (desktop only) and a menu for that document will appear. Select the **Copy / Move Document** function which will launch the associated form prompting you to select the destination folder. Browse to the folder where the file is being moved. Click Copy or Move to complete the transaction.



### Rename Document

The Rename Document function is available to an **Editor** and **Administrator** for both **desktop** and **mobile** environments. The function is available when a file is selected within a folder. If there are no documents in the folder (or if the folder is an archive folder), then the function is not available.

Select the document and click the ellipsis icon [:] and a menu for that document will appear at the bottom of the display; or right-click on the file record (desktop only) and a menu for that document will appear. Select the **Rename Document** function which will launch the associated form prompting you to rename the existing file. Type the new file name in the form, and click OK. The file name will then change.

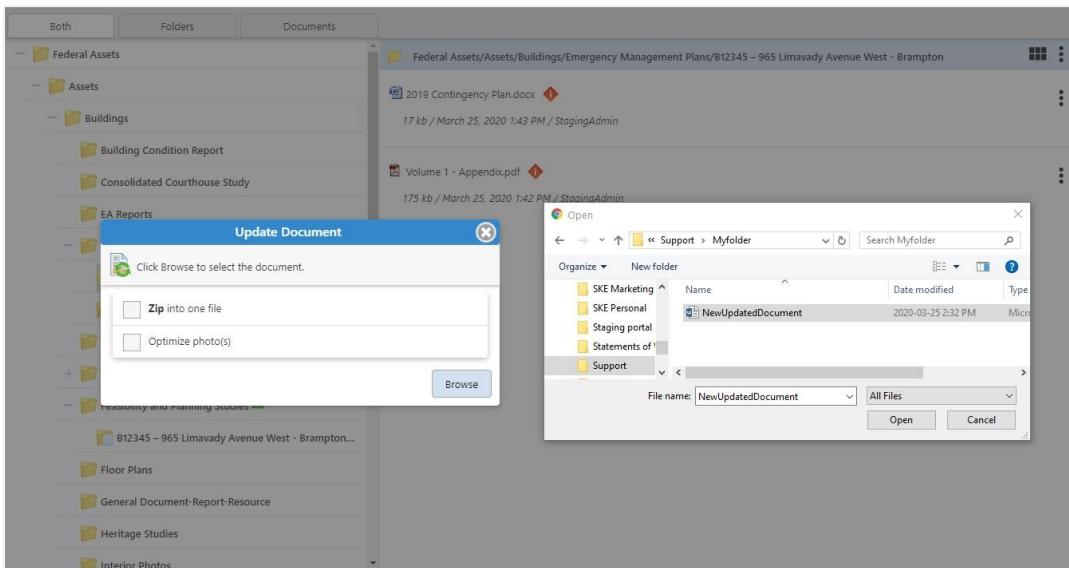


### Update Document

The Update Document function is available to an **Editor** and **Administrator** for both **desktop** and **mobile** environments. The function is available when a file is selected within a folder. If there are no documents

in the folder (or if the folder is an archive folder), then the function is not available. This function physically replaces the selected file with a new file of the same name and type. Files in an Archive folder cannot be updated.

Select the document and click the ellipsis icon [:] and a menu for that document will appear at the bottom of the display; or right-click on the file record (desktop only) and a menu for that document will appear. Select the **Update Document** function which will launch the associated form prompting you to browse on your local computer/network to the source file location. Select the local file and click Update to replace the existing file in DocumentViewer. While the document uploads, a progress bar will be displayed. Once the upload is complete, a pop-up will confirm the upload saying, “**X file(s) uploaded successfully**”. Close the pop-up.



Before selecting the update file, you also have the option to specify:

- **Zip into one file** – This takes the selected file and adds it into a WinZip file to compress their size.
- **Optimize photo(s)** – When uploading images (photographs), you can choose whether or not the system will automatically optimize the image file size so that it's more manageable in DocumentViewer and other web applications. Often photographs taken by digital cameras have very large file sizes which makes them time-consuming to upload and download. Unless the photographs need to retain all their detail it is advisable to reduce their size. The process will not cause any noticeable difference in quality when viewing the entire photo. The difference will only be noticeable if specific parts of the image are being viewed or if the image is to be printed on large format printers, e.g., poster size. If uploading scanned documents, it is not advisable to use this optimization feature as the quality of the scanned text can be lost. If unsure about this feature try it for one image file or use your own image software to reduce the image size before uploading. The latter options will allow you to control the amount of file reduction. Photographs for general browsing should not be more than 200 - 400 KB in size. The optimization process not only compresses the image but also reduces the height and width of the image. Utilizing this function will

make the following changes: Image files that are 10 MB or less are reduced to 50% of the original size. Files that are 10-20 MB are reduced to 40% of the original size. Any images larger than 20 MB are reduced to 30% of their original size. For example, a 3.5 MB digital photo that is 4000x3000 will be reduced to 320 KB and 2000x1500.

The existing file will automatically be placed in an “(archive)” folder underneath the parent/selected folder. Each Update transaction for that file will create a *new version* of the achieved file in the archive folder.

## Manage Metadata Information

The Manage Metadata Information function is available to an **Editor** and **Administrator** for both **desktop** and **mobile** environments and only for files that are in indexed folders. The function is available when a file is selected within a folder. If there are no documents in the folder (or if the folder is an archive folder), then the function is not available.

The system automatically captures the basic information about a file such as its name, type, size, date it was uploaded, and who uploaded it (considered as “system metadata”). However, with the Manage Metadata function, you can also add more user information (considered as “user metadata”):

- **Date Modified** - the date the document was last changed. Input the date by clicking on the field and a calendar will launch to help you input a specific date.
- **Subject** - a descriptive outline of the document content/purpose. If the subject is not listed in the pick list, use the “New” button to enter it.
- **Author and Author Organization** - the name and organization of the author/creator of the document. If the Author or Author Organization are not listed in the pick list, use the “New” button to enter it.
- **Security / Sensitivity** - any restrictions on access or use associated with the document (such as Internal Use Only). If the Security / Sensitivity value is not listed in the pick list, use the “New” button to enter it.
- **Document Type** - the type of information associated with the document (such as a photo, drawing, site plan, consultancy report...). If the Document Type value is not listed in the pick list, use the “New” button to enter it.
- **Keywords** - words and word phrases that best describe the content/purpose of the document. Use “Select” to choose the keyword(s) for the document. If the keyword is not listed in the pick list, use the “New” button to enter it. Since there can be multiple keywords, you can use the New button as often as required to fully populate the listing. There is also a “Remove” button, should you wish to remove one or more keywords that are in the list. To remove a keyword, select it from the list and click “Remove”.
- **Description** - a free text field enabling a more detailed outline of the document's content/purpose.

**Metadata Information**

Apply to all files in this folder

Date Modified

Subject / Title

Author

Author Organization

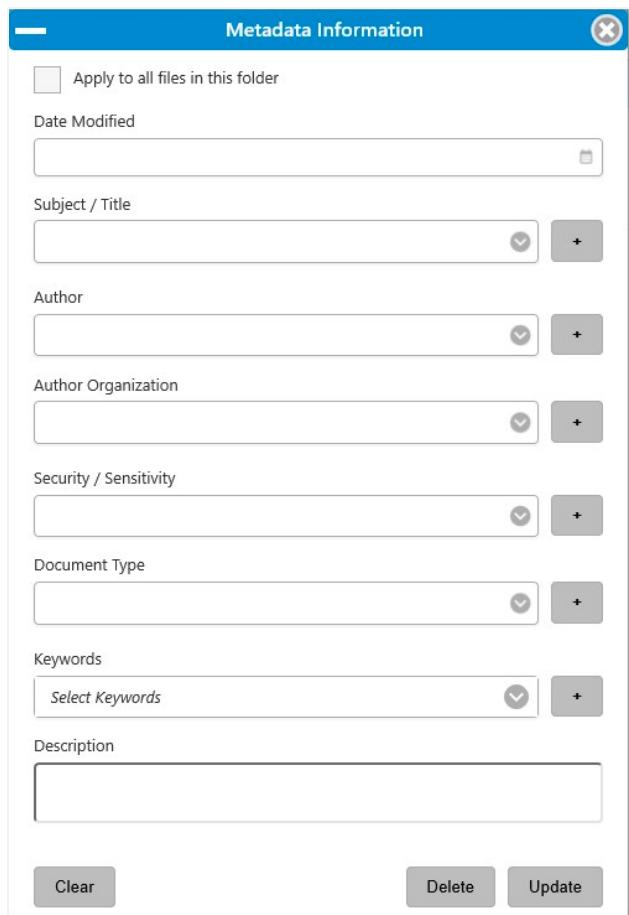
Security / Sensitivity

Document Type

Keywords

Description

**Clear** **Delete** **Update**



The “i” icon  beside the file name will launch a form showing the available metadata for that file.

To add user metadata, select the document and click the ellipsis icon [:] and a menu for that document will appear at the bottom of the display; or right-click on the file record (desktop only) and a menu for that document will appear. Select the **Manage Metadata** function which will launch the associated form prompting you to fill it in. When done close the form. Any items you add in the pick lists will automatically remain in the system and be available for that root folder and all sub-folders, for all users.

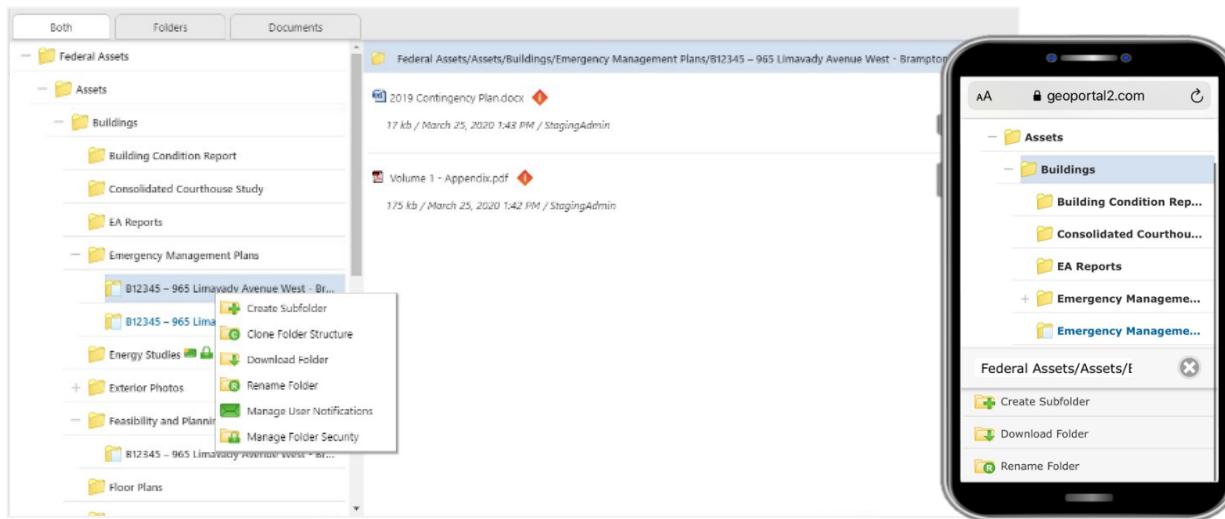
The content in the metadata fields applies to the Selected Document. However, you also have the option to apply the metadata to all of the files in a folder, updating all/some of the attributes at once. This is done by adding in the common metadata, selecting the option at the top of the form to **‘Apply to all files in this folder’** and click Update. Next, you can select each file separately and input additional file-specific metadata.

## 6 Folder Functions Overview

To access the folder functions in Folders Pane: If using a mouse right click on the selected folder name in the Folders Pane and a menu with folder functions will appear. If using a mobile device press and hold your finger on the folder and a menu with folder functions will appear at the bottom of the display.

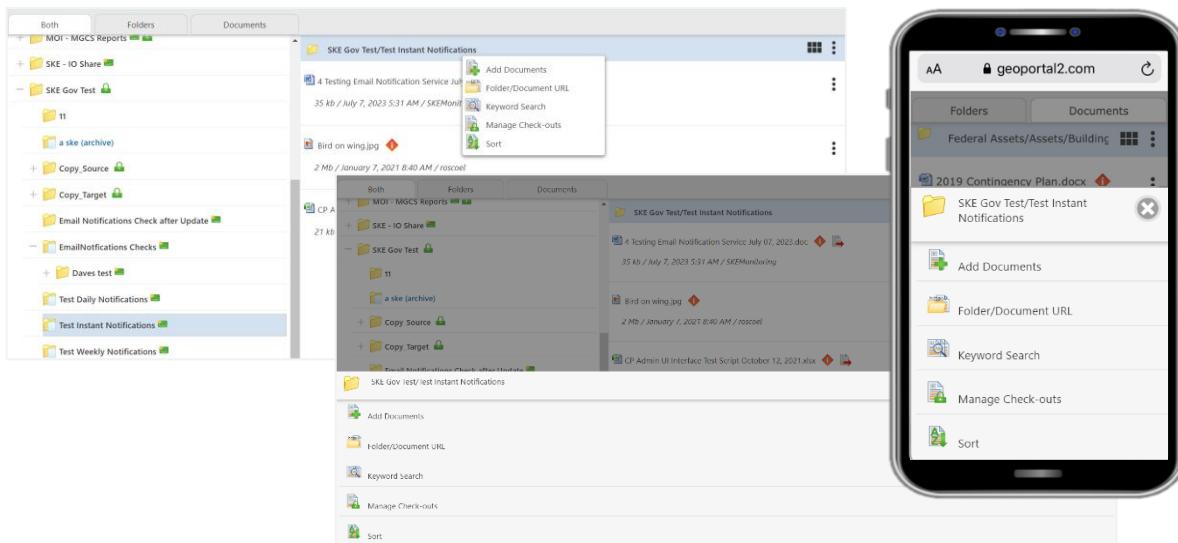
The available Folder functions in the Folders Pane are: Create Subfolder, Clone Folder Structure, Download Folder, Rename Folder, Manage User Notifications, and Manage Folder Security. All these functions are only available to the Administrator role except for the Download Folder and Manage User Notifications.

**Note**, in the Mobile version the Clone Folder, Manage User Notifications and Manage Folder Security functions are not available because of the complexity of the user interface and the available screen size in a mobile environment.



To access the folder functions in Documents Pane: If using a mouse, right-click on the folder banner (light blue bar at the top of the document pane), and a menu with specific selected folder functions will appear. As well you can click or press the ellipsis icon [...] on far right of the folder banner (light blue bar) and a menu will appear at the bottom of your display, for both mobile and desktop environments.

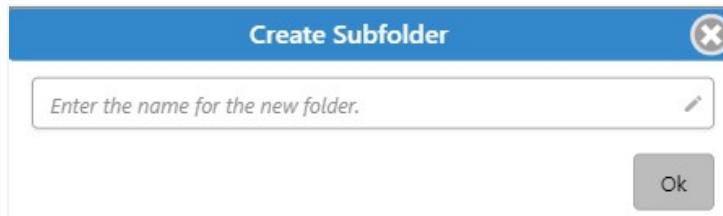
The available Folder functions in the Documents Pane are: Add Documents, Folder/Document URL, Keyword Search, Manage Check-outs and Sort, which are available to all user roles, except for the Add Documents function which is only available to Editors and Administrators and the Manage Check-outs function which is only available to Administrators.



## 7 Folder Functions within the Folder Pane

### Create Subfolder

The Create Subfolder function is available to an **Administrator** for both **desktop** and **mobile** environments. If using a mouse right click on the selected folder name and a menu with folder functions will appear. If using a mobile device press and hold finger on the folder and a menu with folder functions will appear at the bottom of the display. Click the **Create Subfolder** function which will launch the associated form. Type the name of the new folder in the form, and click OK. The folder will be added in the hierarchy below the selected (parent) folder.



### Clone Folder Structure

The Clone Folder Structure function is available to an **Administrator** for both **desktop** and **mobile** environments. This takes the folder hierarchy below a selected folder (its sub-folders but not the files) and will clone/copy them to a different part of the folder hierarchy. To start, if using a mouse right-click on the selected folder name and a menu with folder functions will appear. If using a mobile device press and hold finger on the folder and a menu with folder functions will appear at the bottom of the display. Click the **Clone Folder Structure** function which will launch the associated form. Navigate to and select (click on) the parent (target) folder. Selecting the parent folder will perform the cloning. The clone folder(s) will now appear in the hierarchy below the parent.



### Rename Folder

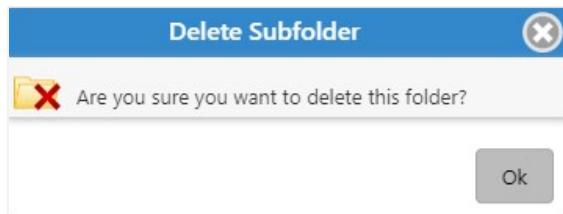
The Rename Folder function is available to an **Administrator** for both **desktop** and **mobile** environments. If using a mouse right click on the selected folder name and a menu with folder functions will appear. If using a mobile device press and hold finger on the folder and a menu with folder functions will appear at the bottom of the display. Click the **Rename Folder** function which will launch the associated form. Edit the name in the form, and click OK.



**Note:** the top-level folder(s) / root folder(s), called the “Document Source”, cannot be renamed by any DocumentViewer role. These folders are defined and named/renamed by SKE.

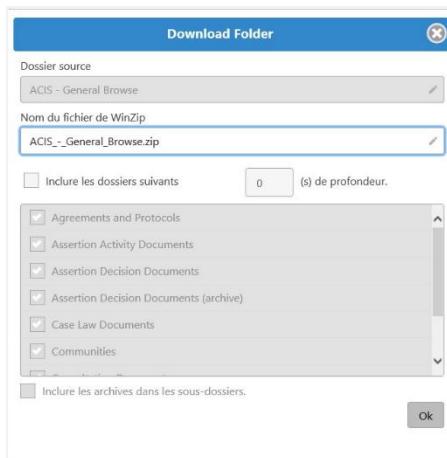
## Delete Folder

The Delete Folder function is available to an **Administrator** for both **desktop** and **mobile** environments. If using a mouse right click on the selected folder name and a menu with folder functions will appear. If using a mobile device press and hold finger on the folder and a menu with folder functions will appear at the bottom of the display. Click the **Delete Folder** function which will launch the associated form asking for confirmation. Click OK to complete the transaction. A folder cannot be deleted until all documents or sub-folders are deleted.



## Download Folder

The Download Folder function is available to all **Users** for both **desktop** and **mobile** environments. It enables you to extract the contents of a folder and its sub-folders and have it packaged into a WinZip file, which will be automatically downloaded. If using a mouse right click on the selected folder name and a menu with folder functions will appear. If using a mobile device press and hold finger on the folder and a menu with folder functions will appear at the bottom of the display. Click the **Download Folder** function which will launch the associated form.



When you invoke the function specify:

- The name of the WinZip file that is created and used for packaging the documents and folders.
- Whether you want to include any sub-folders and how many levels deep.

- If you are including sub-folders then which ones. Note, you can only specify the sub-folders in the source folder. The levels deep will apply to these sub-folders only.
- Whether you want to include archive sub-folders as well.

Due to size and security limitations, Download Folder will limit the size of the WinZip file to 1 GB. It will also stop processing after 10 minutes of operation. In either case, try to download sub-folders separately.

## Manage User Notifications

The Manage Email Notifications function is available to **Administrators** and only for **desktop** environments. The Manage User Notification function enables email notification rules to be set for all users. This allows users to be notified when the following changes occur:

- Add Document
- Update Document
- Delete Document
- Archive Document
- Add Folder
- Update Folder
- Delete Folder

The frequency of notification can be Immediate, Daily, or Weekly. If “Immediate”, then each transaction will generate a notification. The Daily and Weekly notification is a consolidation of all activities in that folder during that time period. (See sample email below).

Federal GeoPortal DocumentViewer Notification Service

The day's transactions in the document library to which SKE Monitoring has access.

Transaction	Folder	Document	Time	Performed By
Delete Document	<a href="#">SKE Fed Test/Email Notification Check</a>	4 Testing Email Notification Service April 02, 2020.doc	4/3/2020 7:40:00 AM	SKE Monitoring
Add Document	<a href="#">SKE Fed Test/Email Notification Check</a>	<a href="#">4 Testing Email Notification Service April 03, 2020.doc</a>	4/3/2020 7:41:01 AM	SKE Monitoring

To change your notification setting, launch DocumentViewer and click on the Notify icon beside the folder of interest.

For help, use the Help function in DocumentViewer or contact [support@canadageoportal.com](mailto:support@canadageoportal.com).

## Who Can Set / Change Notification Settings?

The DocumentViewer **Administrator** defines the notification settings for a folder and its sub-folders. These settings apply to all users who have access to that folder and sub-folders, and they become the default settings for each user.

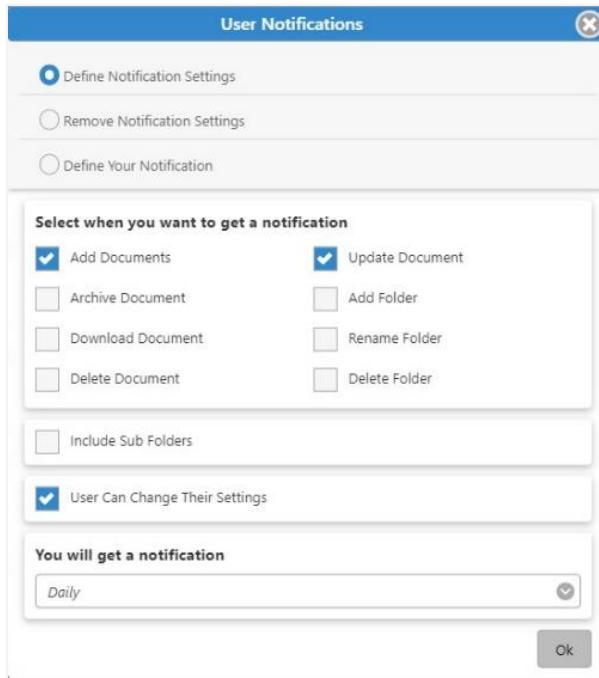
**Users** can change the default notification settings defined by the Administrator only if the folder's “**User Can Change Their Settings**” is turned on. Any changes to the default settings will only apply to that specific user.

The system indicates what folders can be changed using different icons beside the folder name in the Folder frame window.

Icon	Description
	Notification settings have been set and can be edited.
	Notification settings have been set by the Administrator specifically for this folder. Only the Administrator ever sees this icon.
	Notification settings are in place, but the user has turned them off.
	The folder <i>has</i> notification settings, but these cannot be changed by the user. If the user clicks the icon they see the notification settings, but they cannot change them
	If there is no icon next to a folder name then the Administrator has not set any notification settings for the folder.

If using a mouse right click on the selected folder name in the Folders Pane, or on the folder banner (light blue bar) in the Documents Pane, and a menu with specific selected folder functions will appear. You can also press the ellipsis icon [:] on the far right of the folder banner (light blue bar) in the Documents Pane and a menu will appear at the bottom of your display. Select the **Manage User Notifications** function which will launch the associated form, which provides three options:

1. Define Notification Settings
2. Remove Notification Settings
3. Define Your Notification



## 1. Define Notification Settings

This option defines the notification settings for all users with access to that folder. Notifications can be assigned for several activities as shown in the form.

By default, Add Document and Update Document are turned on.

The “**Include Sub Folders**” option will cascade the settings to all its sub-folders UNLESS specific settings have already been set for a sub-folder (and therefore its sub-folders). In this case, any previously set notification rules will take precedence. As well, if a *new* sub-folder is added later, it too will inherit these notification settings.

The “**Users Can Change Their Settings**” option enables users to disable or change the default notification settings made by the Administrator. If this option is not checked, users can view but not disable or change their settings.

The “**You will get a notification:**” option reflects the urgency of the notification, and can be set to “**Immediately**” (less than an hour), “**Daily**” (at a fixed time each day during off hours) and “**Weekly**” (at a fixed day of the week). The Daily and Weekly notification is a consolidation of all activities in that folder during that time period. The fixed times for sending emails are controlled by the notification service and are not configurable through DocumentViewer. The weekly notifications go out mid-week (on Wednesday early morning).

## 2. Remove Notification Settings for Users

This will remove all notification settings for that folder and, if the “Include Sub Folders” is checked on, for its sub-folders UNLESS specific settings have already been set for a sub-folder (and therefore its sub-folders too). If you try and remove notification settings for a folder and it has inherited settings from a parent folder, then the rules must be removed at the parent level.

### 3. Define Your Notification

Let's the Administrator modify the notification settings that he/she will receive that are specific to them.

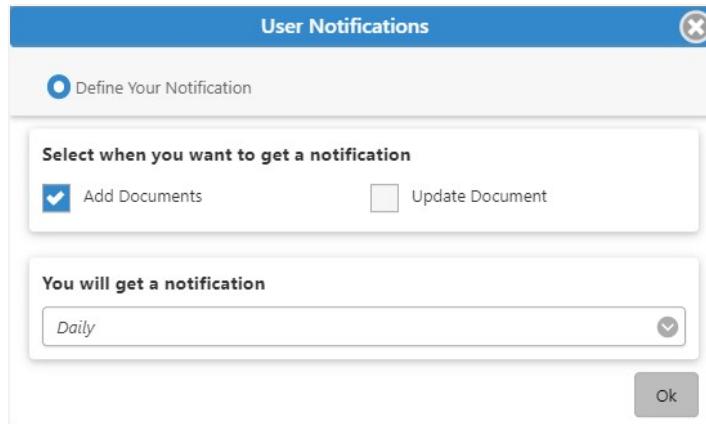
**Note:** As the administrator switches between defining settings for all users and their own settings, the system keeps track, so when OK is pressed both their settings and the user settings are saved.

#### User Notification Functions

The user can change notification settings on a folder if the Administrator has enabled the **Users Can Change Their Settings** option for that folder. The user's settings will override settings defined by the Administrator.

The DocumentViewer Notification Service form will only show transactions that have been enabled by the Administrator. In other words, the user can't turn on or off a notification that isn't already turned on for that folder by the Administrator.

By checking on “Include Sub Folders” the user's changes will be applied to any sub-folders that they are permitted to change. The user may also specify a different frequency for notification.



#### Notification Email

Below is a sample of the email that a user receives. Note that the email contains links directly to the folder and files for which they are being notified. If the email recipient has access permissions, then clicking on these links will open DocumentViewer to that folder, or download the file, respectively.

Federal GeoPortal DocumentViewer Notification Service



The day's transactions in the document library to which SKE Monitoring has access.

Transaction	Folder	Document	Time	Performed By
Delete Document	<a href="#">SKE Fed Test/Email Notification Check</a>	4 Testing Email Notification Service April 02, 2020.doc	4/3/2020 7:40:00 AM	SKE Monitoring
Add Document	<a href="#">SKE Fed Test/Email Notification Check</a>	<a href="#">4 Testing Email Notification Service April 03, 2020.doc</a>	4/3/2020 7:41:01 AM	SKE Monitoring

To change your notification setting, launch DocumentViewer and click on the Notify icon beside the folder of interest.

For help, use the Help function in DocumentViewer or contact [support@canadageoportal.com](mailto:support@canadageoportal.com).

## Manage Folder Security

The Folder Security function is available to an **Administrator** and only for **desktop environments**. By default, any user that is given access to the root folder (called a document source) automatically has access to all the associated sub-folders. This is defined outside of DocumentViewer by assigning users in GeoPortal User Access Manager to security groups, which in turn are given access to the root folder (document source).

The Folder Security function enables an Administrator to refine user access to the root and sub-folders. The Administrator can go to any part of the folder hierarchy and change access privileges and roles for any user at that level of the hierarchy and its sub-folders.

When the Folder Security function is invoked, the following form will appear allowing the Administrator to set different access controls. The form is divided into two parts. The first part has global operators for Allowing or Denying Access for all users. The second part lists the users (Username), their Access and the Role they have.

If using a mouse right click on the selected folder name and a menu with folder functions will appear. Click the **Manage Folder Security** function which will launch the associated form allowing the Administrator to set different access controls. The form is divided into two parts. The first part has global operators for Allowing or Denying Access for all users. The second part lists the users (Username), their Access and the Role they have.

**Allow All** – all users listed will be allowed access to the folder and its sub-folders if Apply to Sub-Folders is checked on. This is the default state. Invoking this function will set the Access radio button next to each user's name to Allow. If new users are added through GeoPortal User Access Manager this Folder Security setting will automatically apply to their access.

**Folder Security**

Federal Assets/Assets/Buildings/Feasibility and Planning Stud

Apply to Sub-Folders

User	Access	Role
StagingEditor, StagingEditor	Deny <input type="radio"/>	Editor <input type="radio"/>
StagingUser, StagingUser	Deny <input type="radio"/>	User <input type="radio"/>

**Deny All** – all users will be denied access to this folder and its sub-folders if Apply to Sub-Folders is checked on. Invoking this function will set the Access radio button next to each user's name to Deny. If new users are added through GeoPortal User Access Manager this Folder Security setting will automatically apply to their access.

**Username** - the list of users shown in the main part of the form identifies all the users that have access to this folder based on the root folder settings as defined in GeoPortal User Access Manager. By default, all users have access (Access = Allow). The Administrator can Deny access for specific users and can change their default role. If the Apply to Sub-Folders is checked on then Access and Role will apply to the sub-folders as well.

Once individual user access is set for one or more users, any new users that are added through GeoPortal User Access Manager will have their Access set to Deny at that level of the hierarchy and to sub-folders if Apply to Sub-Folders is checked on. For example, if the Administrator sets user access for one or more existing users at the third level of the folder hierarchy with Apply to Sub-Folders, and then a new user is added, that user will automatically have access to the first and second level of the hierarchy (the default state), and be denied access at the third level and its sub-folders. The assumption is that the Administrator wants to control access privileges at the third level of the hierarchy for individual users. Therefore, any new users should be automatically denied access until the Administrator sets their access at that level of the hierarchy.

Making a User or Editor into an Admin will grant the user the same privileges as the full DocumentViewer Administrator at that folder and its sub-folders if Apply to Sub-Folders is checked on. Caution should be exercised when doing this as an Admin can change global settings and can control Folder Security for users.

Settings can be changed at multiple levels of the folder hierarchy. For example, the user can have access to the root as a User but be denied access to the first sub-folder (first definition of Folder Security), and then granted access to the third level sub-folder (second definition of Folder Security) as an Editor. This will allow the Administrator to control whether users can see content and whether they can change the content at any level of the hierarchy.

When Folder Security is set, the Administrator can subsequently Update the settings or Delete them. Any Update or Delete will only apply to the Folder Security settings made at that level of the folder hierarchy. Any other settings at different levels of the hierarchy will not be affected.

Deleting the Folder Security settings at any level will revert the user privileges to the default state as defined in GeoPortal User Access Manager, unless other Folder Security Settings apply further up the hierarchy, especially if Apply to Sub-Folders has been checked on.

Once Folder Security is set a Pad Lock icon will appear to the right of the folder name in the DocumentViewer left frame to denote a folder security rule being set at that level of the folder hierarchy. Clicking on the Pad Lock icon will launch the Folder Security form (you can also launch the form from the Folder menu in the toolbar). Only



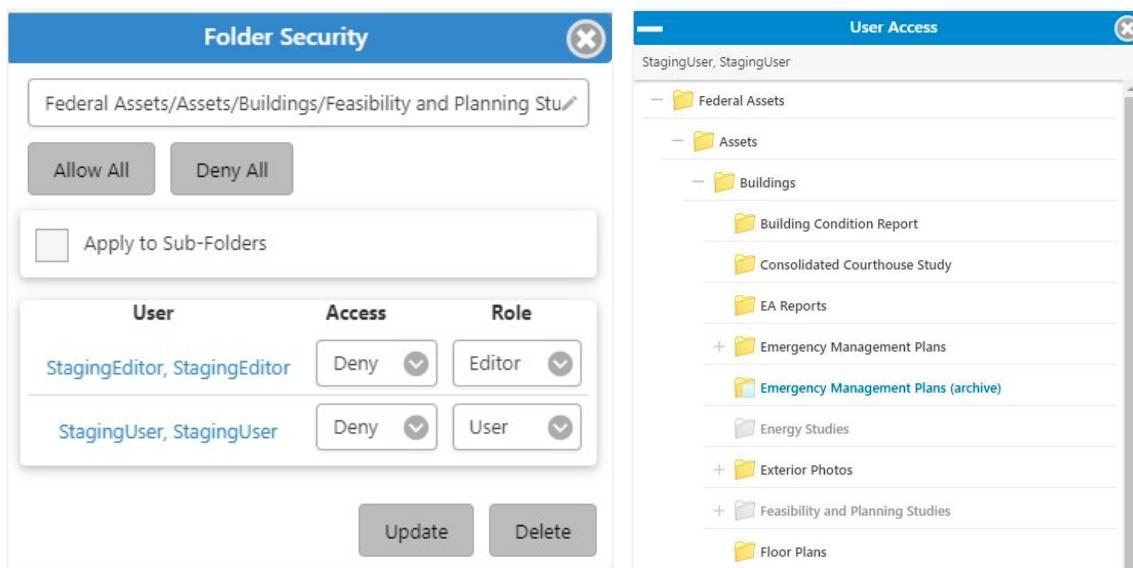
Administrators will see the padlock icon and have access to this function.

If a user has been denied access to a folder, the folder will be visible but grayed out in the DocumentViewer Folders Pane. As well they will not:

1. Be shown any documents when they click on that folder.
2. Receive any documents from a Download Folder for that folder(s).
3. Receive document notification emails for that folder(s).

## Determining User Access

In order to determine what access a user has the Administrator can invoke the User Access function. By clicking on the hyperlinked Username, they will bring up the User Access sub-form, which shows the folder hierarchy for that user.



The image shows two windows side-by-side. The left window is titled 'Folder Security' and contains a list of folders under 'Federal Assets/Assets/Buildings/Feasibility and Planning Stu'. It has buttons for 'Allow All' and 'Deny All', a checkbox for 'Apply to Sub-Folders', and a table for setting access roles for users. The right window is titled 'User Access' and shows a hierarchical tree of folders for 'StagingUser, StagingUser'. It includes 'Federal Assets', 'Assets', 'Buildings', 'Building Condition Report', 'Consolidated Courthouse Study', 'EA Reports', 'Emergency Management Plans', 'Emergency Management Plans (archive)', 'Energy Studies', 'Exterior Photos', 'Feasibility and Planning Studies', and 'Floor Plans'.

User	Access	Role
StagingEditor, StagingEditor	Deny	Editor
StagingUser, StagingUser	Deny	User

The Administrator can then navigate through the folder hierarchy and see where the selected user has access and where they are denied access. Any folders that a user is denied access to will be shown in gray text.

## Example of Setting User Access

Let's take the following example to further explain how Folder Security works:

Folder1 (root level folder / document source)

- Folder1-1
  - Folder1-1-1
  - Folder1-1-2

- Folder1-2
  - Folder1-2-1
  - Folder1-2-2
- Folder1-3
  - Folder1-3-1
  - Folder1-3-2

We have three users when we start: User1, User2, and User3.

The initial access state for DocumentViewer is all users that are part of a security group, regardless of when they are added to the group (now or in the future), automatically have access to the root folder (Folder1), and all sub-folders. You must then assign specific Folder Security to change this initial access state. The following steps describe how different access control can be set for different users in different folders:

1. Deny All at Folder1. This would be considered Rule1 and should always be done when we want to control access to various folders. The reason is the initial access state is always Allow All for all users that are part of the security group assigned to the root folder (done outside of DocumentViewer by GeoPortal Administrator).
  - If we also specified Apply to Sub-Folders when we do a Deny All at Folder1, then all users will not have access to any of the sub-folders. Basically, everything is greyed out for all users.
  - If we did not specify Apply to Sub-folders then the Deny All rule only applies at the root level folder (Folder1), and all sub-folders remain accessible to all users because of the initial access state.
2. If at Folder1-1 we wanted specific user access for User1, we would grant Access to this user only. This would be considered Rule2.
  - If we did NOT specify Apply to Sub-Folders when granting access to Folder1-1 for User1, then User1 does not have access to the sub-folders Folder1-1-1 and Folder1-1-2. In this case Rule1 which is Deny All with Apply to Sub-Folders applies to these sub-folders and no one has access.
  - However, if we set Apply to Sub-Folders as part of Rule2, this would make sub-folders Folder1-1-1 and Folder1-1-2 accessible to User1. User 2 and User3 remain without access because Rule2 only applies to User1.
3. If we go back to Folder1 and do an Allow All (update Rule1). This now makes Folder1 accessible to all users (they can see any content in this folder):
  - If the Apply to Sub-Folders is checked on for Rule1 that does not change User2 and User3 access to Folder1-1; Folder1-1-1; Folder1-1-2. That access continues to be governed by Rule2. In other words, rules further down the folder hierarchy take precedence over the rules above.
  - Folder1-2, Folder1-3, and their sub-folders are now accessible to all users as Rule 1 is Allow All with Apply to Sub-Folders, and there are no other rules to take precedence at this level.
4. If we then add sub Folder1-4 without specifying any access rule at this level:
  - Rule1, which is now Allow All with Apply to Sub-Folders at Folder1, applies to this new folder and all users have access.

- However, let's now define an access rule (Rule3) with specific access to this sub-folder for User3. This keeps Folder1 accessible to all users (Rule1), and Folder1-4 accessible only to User3 because there is now a rule there (Rule3). Folder1-2 and Folder1-3, and their sub-folders, remain accessible to all users because of Rule1, which is Allow All with Apply to Sub-Folders. There are no other rules at these sub-folders to change user access for all users.

5. If we then Add a new user (User4) and assign to the security group that has access to Folder1 (done outside of DocumentViewer by GeoPortal Administrator). All the existing rules at whatever level automatically apply to the new user, otherwise the initial access state of Allow All applies.

## 8 Folder Functions within the Documents Pane

### Add Documents

The Add Documents function is available to an **Editor** or **Administrator** for both **desktop** and **mobile** environments. The Add function enables you to add one or more files into the currently selected folder.

- a) In Application Mode: When DocumentViewer is called by a business application to add a file, you are automatically taken to the appropriate folder and the Add Document form opens.
- b) In Generic Mode: If using a mouse right click on the selected folder name in the folder banner (light blue bar at the top of the File frame), and a menu with folder functions will appear. If using a mobile device press and hold your finger on the selected folder name in the folder banner (light blue bar at the top of the File frame), and a menu with folder functions will appear at the bottom of the display. Click the **Add Documents** function which will launch the associated form prompting you to browse to the local computer/network file(s) you want to add.

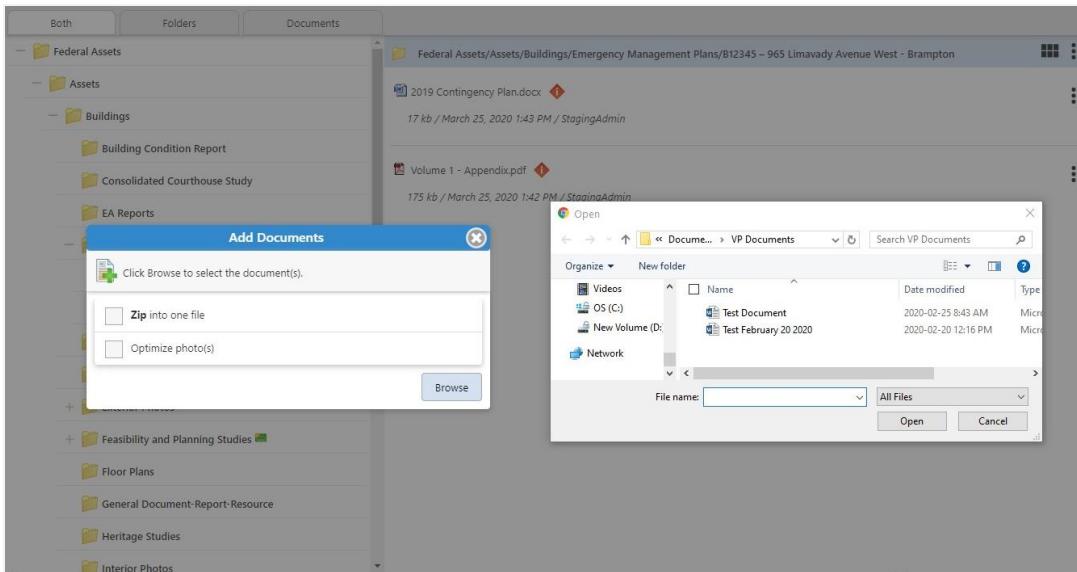
#### **Note about Archive Folders**

*You can't add files directly to an Archive folder. DocumentViewer automatically adds versioned files to the archive folder. The only function available in an archive folder is to delete a versioned file.*

To Add one file, click “Browse” and navigate to that file on your local computer/network. Highlight it and click Open.

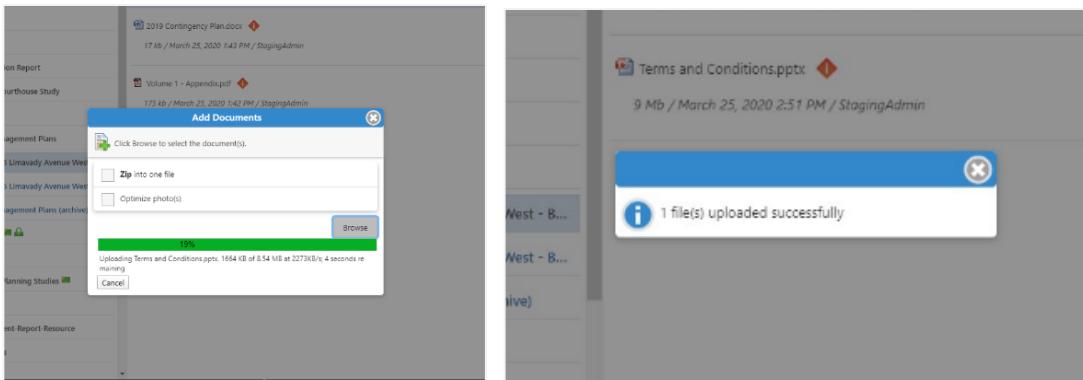
To add multiple files/documents at the same time, click on the first file and hold the Shift key (sequential selection) and click on the last file, or hold the Ctrl key (individual selection) to select one or more individual files on your local computer/network, then click Open to finish and upload the documents to DocumentViewer.

Drag-and-drop is available for uploading files. You can drag a file (or files) from your desktop into the Documents Pane – you will see a thumbnail of what is being moved in and then you can drop it there. The Drag-and-drop function is limited to a maximum file size of 500MB.



Before browsing and selecting files to add, you have the option to specify:

- **Zip into one file** – This takes the selected files and adds them into a WinZip file to compress their size.
- **Optimize photo(s)** – When uploading images (photographs), you can choose whether or not the system will automatically optimize the image file size so that it's more manageable in DocumentViewer and other web applications. Often photographs taken by digital cameras have very large file sizes which makes them time-consuming to upload and download. Unless the photographs need to retain all their detail it is advisable to reduce their size. The process will not cause any noticeable difference in quality when viewing the entire photo. The difference will only be noticeable if specific parts of the image are being viewed or if the image is to be printed on large format printers, e.g., poster size. If uploading scanned documents, it is not advisable to use this optimization feature as the quality of the scanned text can be lost. If unsure about this feature try it for one image file or use your own image software to reduce the image size before uploading. The latter options will allow you to control the amount of file reduction. Photographs for general browsing should not be more than 200 - 400 KB in size. The optimization process not only compresses the image but also reduces the height and width of the image. Utilizing this function will make the following changes: Image files that are 10 MB or less are reduced to 50% of the original size. Files that are 10-20 MB are reduced to 40% of the original size. Any images larger than 20 MB are reduced to 30% of their original size. For example, a 3.5 MB digital photo that is 4000x3000 will reduce to 320 KB and 2000x1500.



While the file uploads a progress bar will be displayed. Once the upload is complete, a pop-up will confirm the upload indicating “X file(s) uploaded successfully”. Close the pop-up.

**Note:** If you are adding a file that is open on your desktop only the last saved version will be uploaded.

For security reasons some file types are not allowed; and some characters in file names will be automatically changed or removed. See “Appendix A – Restrictions for File Size, File Type and Reserved Characters” for these restrictions.

## Folder/Document URL

The Folder/Document URL function is available to **all roles** for both **desktop** and **mobile** environments. The URL associated with a document or folder can then be published and accessed directly from any web page/browser.

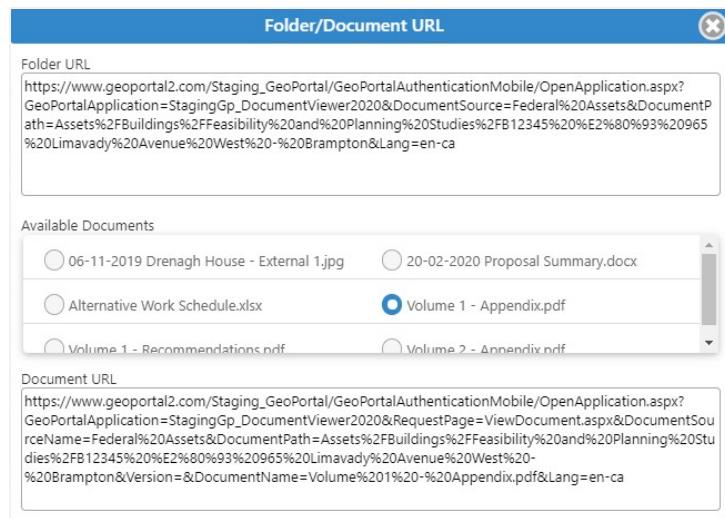
Publishing a **Folder URL** will enable DocumentViewer to be launched and opened to that specific folder for those users with appropriate permissions.

Publishing a **Document URL** will allow users with appropriate permissions to download the associated document.

If using a mouse right click on the selected folder name and a menu with folder functions will appear. Select the **Folder/Document URL** function which will launch the associated form. You can also press the ellipsis icon [:] on far right of the folder banner (light blue bar) and a menu will appear at the bottom of your display, for both mobile and desktop environments. Select the Folder/Document URL function which will launch the associated form.

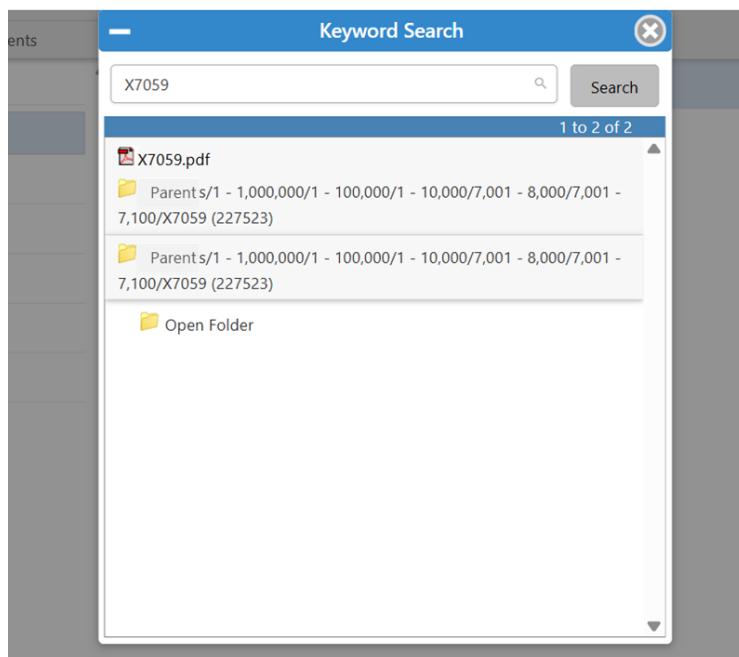
In the form that pops-up the first frame shows the URL to the selected folder. The second frame lists all the documents in the selected folder. You can then select any one of the files by clicking on it. Once a file is selected then the third frame will display the URL for that file.

Use your mouse or finger to select the entire URL text string and then CTRL+C to copy it into memory for pasting into a browser or another document, email, etc.



## Keyword Search

The Keyword Search function is available to **all roles** for both **desktop** and **mobile** environments. It searches on document and folder names and the associated system and user (if available) Metadata. If using a mouse right click (desktop only) on the selected folder name in the folder banner (light blue bar) and a menu with specific selected folder functions will appear. You can also press the ellipsis icon [:] on the far right of the folder banner (light blue bar) and a menu will appear at the bottom of your display, for both mobile and desktop environments. Select the **Keyword Search** function which will launch the associated form. Enter keywords/phrases to return all relevant documents and folders.



The files are listed in alphabetical order based on the full pathname and document name. Click on the file/folder name and the options appear below to download the document or open the folder which

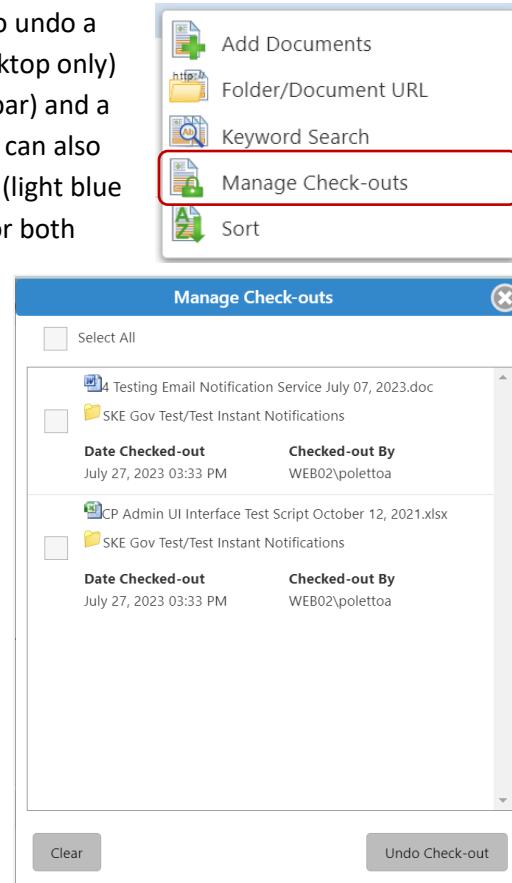
moves to that folder in a new DocumentViewer window. Note, your search results are filtered based on your user access, so you only get to see what you have permission to see.

The Keyword Search form results are retained, and the form can be minimised and reopened to allow other search result records to be accessed.

## Manage Check-outs

Admin can manage all checkouts in a folder, allowing them to undo a check-out done by an Editor. If using a mouse right click (desktop only) on the selected folder name in the folder banner (light blue bar) and a menu with specific selected folder functions will appear. You can also press the ellipsis icon [:] on the far right of the folder banner (light blue bar) and a menu will appear at the bottom of your display, for both mobile and desktop environments. Select '**Manage Check-outs**'. A pop-up will appear listing all the documents that are currently checked out as well as the date they were checked-out on and the user they were checked-out by.

To Undo the Check-out of a document, check off the box beside the document or check off the Select All box and select '**Undo Check-out**'.



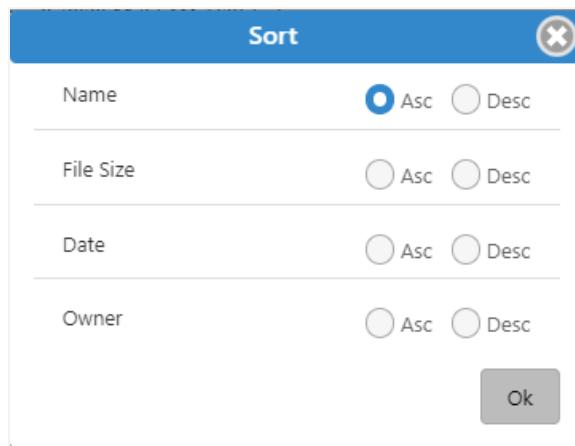
Date Checked-out	Checked-out By
July 27, 2023 03:33 PM	WEB02\polettoa
October 12, 2021	WEB02\polettoa

## Sort Documents



The sort function allows Users, Editors and Admin to select a document attribute and sort the documents within a folder in ascending or descending order. This is useful when there are many documents and an organized view would assist in finding the document of interest.

If using a mouse right click (desktop only) on the selected folder name in the folder banner (light blue bar) and a menu with specific selected folder functions will appear. You can also press the ellipsis icon [:] on the far right of the folder banner (light blue bar) and a menu will appear at the bottom of your display, for both mobile and desktop environments. Select '**Sort Documents**'. A pop-up will appear. It has four categories on which you can sort the documents by; Name, File Size, Date, and Owner. All of which can be sorted in Ascending or Descending order:



The user can select the desired attribute to sort by as well as whether to sort in Ascending or descending order. Select 'Ok'. The folder will refresh sorted in the specified order.

## Restrictions

**File Size.** DocumentViewer has a 500MB size limit per file. Files of more than 500MB will not be uploaded.

**File Type.** DocumentViewer restricts some file types from being uploaded or retrieved. By default, several file extensions are blocked, including any file extensions that are treated as executable files by Windows Explorer. Files with curly braces "{" or "}" are also blocked automatically. The file extensions blocked by default are:

extension	File type	extension	File type
.ade	Microsoft Access project extension	.mdz	Microsoft Access wizard program
.adp	Microsoft Access project	.msc	Microsoft Common Console Document
.ashx	ASP.NET HTTP handler	.msi	Microsoft Windows Installer package
.asmx	ASP.NET Web Service Source file	.msp	Windows Installer update
.app	Application file	.mst	Visual Test source files
.bas	Microsoft Visual Basic class module	.ops	Microsoft Office profile settings file
.bat	Batch file	.pcd	Photo CD image or MS Visual Test compiled script
.chm	Compiled HTML Help file	.pif	Shortcut to MS-DOS program
.class	Java class file	.prf	System file
.cmd	Microsoft Windows NT Command Script	.prg	Program source file
.com	Microsoft MS-DOS program	.reg	Registration entries
.cpl	Control Panel extension	.scf	Windows Explorer command file
.crt	Security certificate	.scr	Screen saver
.dll	Windows dynamic link library	.sct	Windows Script Component
.exe	Executable program	.shb	Windows shortcut
.fxp	Microsoft Visual FoxPro compiled program	.shs	Shell Scrap Object
.hlp	Help file	.soap	Simple Object Access Protocol file
.hta	HTML application	.svc	WCF Web Service file
.ins	Internet Naming Service	.url	Uniform Resource Locator (Internet shortcut)
.isp	Internet Communication settings	.vb	Visual Basic Scripting Edition (VBScript) file
.jse	JScript Encoded Script file	.vbe	VBScript Encoded Script file
.json	JavaScript Object Notation format	.vbs	VBScript file
.lnk	Shortcut	.wsc	Windows Script Component
.mda	Microsoft Access add-in program	.wsf	Windows Script file
.mde	Microsoft Access MDE database	.wsh	Windows Script Host Settings file
.mdt	Microsoft Access data file	.xamlx	Extensible Application Markup Language file
.mdw	Microsoft Access workgroup		

**Reserved Characters:** When uploading a new file or adding a folder, DocumentViewer will check all paths and file names for reserved characters. If it finds any of the following characters it will convert them automatically, as follows:

Reserved Character	Converted Character
~ (tilde)	single space
# (hash)	single space
% (percent)	single space
& (ampersand)	and
* (asterisk)	single space
{ (open brace)	( (open parenthesis)
} (close brace)	) (close parenthesis)
\ (backslash)	single space
/ (forward slash)	single space
: (colon)	single space
< (less than)	single space
> (greater than)	single space
? (question mark)	single space
+ (plus)	single space
(pipe)	single space
' (apostrophe)	` (backquote)
.. (double period)	. (period)

Any leading periods or underscores are stripped from the front of folder/file names. Trailing periods are also stripped.

**Optimize Photos:** These are the file types that can be optimized by DocumentViewer:

Extension	File type
.gif .giff	CompuServe GIF
.dib	Device-Independent Bitmap
.jpg .jpeg .jif .jfif	Joint Photographic Experts Group
.png	Portable Network Graphics
.tif .tim .tiff	TIFF Revision 6
.wmf	Windows & Aldus Metafile
.bmp	Windows Bitmap
.emf	Windows Enhanced Metafile

## Technical Documentation

DocumentViewer is an interactive web-based application. It works with SharePoint Server 2016 and SQL Server 2017 DBMS; and its architecture enables it to be integrated with other document management system.

### Folder Hierarchy

The DocumentViewer folder hierarchy is a logical structure that can show a specific view of the underlying physical folder structure. Depending on a specific implementation requirement, different folder logical structures can be defined for different uses and user roles.

The logical structure is broken into four components:

1. DocSource – this is the root portion of the folder path. The user will never see this path. Its purpose is to provide an entry point into a specific part of the document management folder hierarchy for a specific application and/or user. This allows entry into a folder structure at any level of the hierarchy.
2. DocSource Name – this is the name given to a specific DocSource instance. The name is displayed in DocumentViewer as the root folder. It is also how user privileges in the GeoPortal Dynamic Access System (DAS) are assigned. Each DocSource Name is considered a DAS Application. For each DAS Application users are assigned and granted a specific role – User, Editor, or Administrator.
3. DocPath – this is the actual static portion of the folder path that the user will see in DocumentViewer under the DocSource Name.
4. ObjectFolder – this is the end-folder of a DocPath. When DocumentViewer is called by a business application, the application will dynamically provide an Object Identifier that is associated with a specific business object. DocumentViewer searches for that folder at the end of the path specified by the DocPath parameter. If it finds the ObjectFolder it automatically takes the user into that folder and enables the functions associated with the user's role. If the folder does not exist, DocumentViewer will automatically create it. DocumentViewer also automatically creates a corresponding Archive folder (named <<ObjectFolder>> (archive) ) when the first document is archived.

For example, the following parameters:

DocSource Name	DocSource	DocPath	ObjectFolder
FMB - Strategic Planning	\MAG\FMB\Strategic Planning\	\Photographs\Buildings\North West\Kenora	<<B-Number>> - <<Building Street Address>>

... will result in the following DocumentViewer folder hierarchy:

-  FMB - Strategic Planning
-  Photographs
-  Buildings
-  North West
-  Kenora
-  B12345 - Drenagh House