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# I - EDocman Installation

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When you purchase **EDocman** extension from our site , you will receive an email contain one file called **edocman\_unzip.zip**. Unzip this file you will see a component, several modules and plug-ins . The sections below explain the functionalities of each file, how to install and configure important parameters .

## 1 - EDocman component

1. **File name** : **com\_edocman.zip**
2. **Functionality** : This is the main component.
3. **Installation** :
  - Login to back-end of your site
  - Access to **Extensions=>Extension Manager** menu item
  - Browse for the file **com\_edocman.zip**
  - Click on **Upload and Install button** .

## 2 - EDocman Categories module

1. **File name** : **mod\_edocman\_categories.zip** .
2. **Functionality** : Display list of **top levels categories** which you setup from back-end. Users can click on one category to view all sub-categories/documents from that category.
3. **Installation:**
  - Login to back-end of your site
  - Access to Extensions=>Extension Manager menu item
  - Browse for the file **mod\_edocman\_categories.zip**
  - Click on Upload and Install button .

## 3 - EDocman Documents Module

1. **File name** : **mod\_edocman\_documents.zip** .
2. **Functionality** : Display **Lastest, Most Popular or Most Downloaded** documents .
3. **Installation:**
  - Login to back-end of your site
  - Access to Extensions=>Extension Manager menu item.

- Browse for the file mod\_edocman\_documents.zip
- Click on Upload and Install button .

## 4 - EDocman Search Plugin

1. **File name** : plug\_search\_edocman.zip .
2. **Functionality** : Allows documents in EDocman can be searched via Joomla standard search (Joomla Search module).
3. **Installation:**
  - Login to back-end of your site .
  - Access to Extensions=>Extension Manager menu item.
  - Browse for the plug\_search\_edocman.zip
  - Click on Upload and Install button .

## 5 - SH404 SEF plugin

1. **File name** : You can find the plugin inside **sh404 plugin** folder.
2. **Functionality** : Generate SEF url for EDocman when you are using **sh404** extension. **Please note you only need to install the plugin if you are using sh404 extension on your site. If you don't use sh404 , don't install this plugin.**
3. **Installation:**
  - Simply upload the file com\_edocman.php in sh404 plugin folder (via FTP) to components/com\_sh404sef/sef\_extfolder of your site.

## II - Using EDocman extension

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### 1- Configuration

When you first install EDocman, the extension auto populate default configuration data. Before start using the extension, please go to **EDocman -> Configuration** to review and change config parameters if needed. Next to each config option, there are explanation of it's meaning at the right, so I won't list all config options here. Below are list of **important config parameters** :

- 1 **General tab** : In this tab, there are general config options. Some config options which you should see and change if needed are :

- 1.1 Documents Path :** You will need to enter **full path** of the folder where your files will be stored. When you first install **EDocman**, the extension create a folder called **edocman** under the root folder of your site and set this config option to full path of this folder. You can change it to any folder you want. Just note : You will need to enter **full path of the folder** into this config option.
- 1.2 Activate Multilingual feature :** If you are building a **multilingual site** and want to setup categories/documents in different languages, set this config option to **Yes** .
- 1.3 Use Herachical Folder Structure :** By default, EDocman upload and store all files under the root folder (which you setup in **Documents Path** config option). If you want to store files in a herachical folder structure, set this config option to Yes. After that, when you create **Category**, you will be able to enter name of folder which you want to store files of documents in this category. Then when you create documents of the category, the extension will upload all files into the folder you entered.
- 1.4 File Upload Method :**
  - 1.4.1** If all your site are stored on server already (you uploaded all the files to server via FTP because the files are big for example...), please set this config option **Choose File from Server**. In this case, when you create/edit a document, the system will display list of files in dropdown and you can choose the file for the document from that dropdown.
  - 1.4.2** If your files are not on server yet, please set this config option to **Upload new file for each document**. In this case, when you create a new document, you will need to browse and upload a file from your computer for this document.
- 2 Messages tab :** This tab contains config option allows you to set Notification emails (which will receive notification) when someone download or upload documents from front-end (if they have permission), define the email subject, email body.....Please review and change it to meet your need.
- 3 Themes tab:** This tab contains config options to control the display of the component in the front-end. Please review and change it if needed.
- 4 Fields tab:** This tab is reserved for future version of EDocman. You don't need to care about it for now.

## 2 - Setup Permission in Component Level

As stated in features list of the extension, **EDocman** provide a very flexible and powerful mechanism for handling permissions (CREATE, EDIT, DELETE, PUBLISH categories and documents). Permission will be inherited in the following structure **Component Permission => Category Permission => Sub-Categories Permission => Documents Permission**. That means :

1. **Component Permission** will be highest level in the list .

2. When you create a category, if you leave permission to Inherit, It will inherit permission which you setup in **Component Level** .

3. When you create a sub-category, if you leave permission to Inherit, It will inherit permission which you setup in **it's Parent Category** .

4. When you create a document, if you leave permission to Inherit, It will inherit permission which you setup in it's category.

Also, please note that a **child Group** will inherit permission from it's Parent Group (if you leave permission to Inherit). For example, if you set **Download Permission** of **Public Group** to be **Allowed**, **All the children groups** of **Public Group** like **Manager, Administrator, Registered....** will have Download Permission **Allowed**.

To setup Permission in **Component Level**, please follow the steps below :

1. Login to back-end of your site
2. Access to EDocman -> Dashboard
3. Click on the **Options** button , a popup window will be displayed to allow you to setup permission for each group. Below are list of permissions and their meaning :
  - **Create** permission : Allows create categories and documents. If you want a group to be able to create categories and documents, set this permission of the group to **Allowed**.
  - **Delete** permission : Allows delete categories and documents. If you want a group to be able to delete categories and documents, set this permission of the group to **Allowed**.
  - **Edit** permission : Allows edit categories and documents. If you want a group to be able to edit categories and documents, set this permission of the group to **Allowed**.
  - **Edit State** permission: Allows publish/unpublish categories/documents.
  - **Edit Own** permission: Allows edit categories/documents submitted by the user himself.
  - **Download** permission: Allows download documents.
4. A simple usage of Permission setting is that you allows Public users to view documents but only allows registered users to download it. In this case, you can set it as follow :
  - In Permission setting screen, leave all other groups to default setting.
  - Click on Registered group, set Download permission to **Allowed**.
  - After that, all other users from **Registered** group and it's children groups ( ) will be able to download documents.
5. If you for example, want all users to be able to download documents, you can setup it as follow :
  - In Permission setting screen, leave all other groups to default setting.
  - Click on Public group, set Download permission to **Allowed**.
  - After that, users from all groups will be able to download documents (that's because **all groups are child of Public group** and Permission is Inherited).

- If you for example, don't want to allow users from a certain groups to be able to download document, simply click on that group and set Download Permission to Denied .

**The two key important rules for setting up permission are :**

1. Permission will be inherited in the following structure **Component Permission => Category Permission => Sub-Categories Permission => Documents Permission**
2. Children groups will inherit permission from it's parent group.

## 3 - Setup Document Categories

**EDocman** allows you to organize your documents cross infinite categories and subcategories. To setup categories, please go to **EDocman -> Categories** . On this page, you will see list of categories which you created and you will be able to add/edit/delete/publish/unpublish categories using the buttons on toolbar.

Below are **list of important fields which you should care when creating new category** :

1. **Category Layout** : Choose the layout which you want to use to display documents from this category layout. Available layouts are :
    - **Default Layout** : [See sample by clicking here](#)
    - **Columns layout** : Display documents in Columns format (several documents each row). [Click here to see a sample](#) .
    - **Table layout** : Display list of documents in table format. Each row contains title of document, created date and download link (should add some more information like file type, filesize, short description, thumbnail.... into this layout in the near future) .
  2. **Access** : Choose the **access level** which you want to allows access to this category, default is Public (which mean all users can access to this category). When you assign an access level to a category, **only users from groups has this access level will be able to view this category**.
  3. **User Ids** : If you want this category can be viewed by some specific users only, you can enter ID of these users into this field - comma seperated. After that, only these users will be able to access to this category (in this case, the **Access setting** explained above **will have no effect**).
  4. **Permissions setting** : Beside setting permission in **Component Level** (which is explained in the top of this article), you can set up permission when you create category as well. If you change the permission setting when creating category, this permission setting which override the permission setting in **Component Level** . For example, by default, you allows all public users to be able to download documents from all categories. Now, you setup a new category called **Company Documents** which allows only registered users to access to this category, you can setup it as below :
- Click on Registered Group, set Download Permission to be **Allowed** .
  - Click on all other groups, set Download Permission to be Denied .

- After that, only users from registered groups can download documents from this category

## 4 - Setup Documents

Next step will be setup documents. To setup documents, please go to **EDocman -> Documents** . On this page, you will see list of documents which you created and you will be able to add/edit/delete/publish/unpublish documents using the buttons on toolbar. Below are **list of important fields which you should care when creating new document** :

1. **File**: Depend on File Upload Method which you choose in Configuration section :

- If you setup it to **Choose File from Server**, you will need to upload files to server (via FTP) before creating documents. In this case, the system will display list of uploaded files in Dropdown and you can choose one file for the document.
- If you setup it to Upload new file for each document, the system will display a button which allow you to browse for a file from your computer for this document (the file will be uploaded when you press Save button in the toolbar).

2. **Access** : Choose the **access level** which you want to allows access to this document, default is Public (which mean all users can access to this document). When you assign an access level to a document, **only users from groups has this access level will be able to view this document**.

3. **User Ids** : If you want this document can be viewed by some specific users only, you can enter ID of these users into this field - comma seperated. After that, only these users will be able to access to this document (in this case, the **Access setting** explained above **will have no effect**).

4. **Permissions setting**: By default when you create a document, the permission setting of this document will be inherited from the category which it is assigned to. If you change the permission setting when creating document, this permission setting which override the permission setting in it's category. For example, by default, you allows all public users to be able to download documents from all categories. Now, you want only user from **Manager** Group can document this document, you can setup it as below :

- Click on **Manager** Group, set Download Permission to be **Allowed** .
- Click on all other groups, set Download Permission to be **Denied** .
- After that, only users from **Manager** group can download this document.

## 5 - Bulk Import

This feature allows you to import all files stored on a folder and create corresponding documents instead of creating one document each time. **This feature can be used if you have all files uploaded to your server before creating documents** . The steps to use this feature are :

1. Go to EDocman -> Bulk Import.
2. Choose the folder you want to import documents from **Folder** dropdown.

3. Choose the category you want to assign these documents to. (Note : You need to create at least one category first before doing the import).
4. Press **Import** button on the toolbar.
5. After that , all documents from selected folder will be imported. The name of each file will be used as title of corresponding document.

## 6 - Change Language Item

All language string which are displayed in the front-end, for example **Categories, Sub-categories, Documents....** displayed in the front-end are defined in a language file (so that you can change it or translate it to different language). To change it, there are two ways :

1. Edit the language file directly. In this case, you can get the language file at **language/en-GB/en-GB.com\_edocman.ini**, edit it to change these language strings and then upload it again to your server .
2. The other (much easier way) is using Build-in Translation function of EDocman to change the language items. In this case, go to **EDocman -> Translation**, you will see the language items and can change it to meet your need without having to edit the language file directly.
3. To translate language file to different languages, you can use the step below :
  - o Get a copy of english language file at **language/en-GB/en-GB.com\_edocman.ini** .
  - o Rename this language file to **LANG\_PREFIX.com\_edocman.in** . **LANG\_PREFIX** is code of the language you want to translate to, for example, with German language, language code is de-DE.
  - o Do the translation
  - o Upload the translated language file to language/**LANG\_PREFIX** folder .

## 7 - Setup Menu Items

After setting up categories and documents, you will need to have a way to allows site users/visitors to access to these categories. The most common ways is creating menu items to link to EDocman pages. The steps are :

1. In the menu management, press New button.
2. In the next screen, look at **EDocman** section .
3. Depend on the setting of your system, you can choose from one of available **views**:
  - o If you want to users to see list of categories which you setup when accessing to this menu item, choose **Categories**view . When users access to this menu item, they will see list



of categories in the system. They can click on a category to browse for documents in this category .

- If you want users to see list of Documents from a category when accessing to this menu item, choose **CategoryView**. If you choose this view, please remember to choose the category you want to display in the menu parameter. When users access to this menu item, they will see list of documents in this category .
- If you want users to see detail information of a document when accessing to this menu item, choose **DocumentView**. If you choose this view, please remember to choose the **Document** you want to display in the menu parameter. When users click on this menu item, the system will display detail page of document and they can click on Download Button (if allowed) to download this document.

## 8 - Modules Setup

The other ways to allows users to access to Categories and Documents are via **EDocman Categories and EDocman Documents** modules which you installed. Just go to Extensions -> Modules manager, find and publish these modules. After that, users will see the categories and documents in the modules and can access to it....