



## Connected Documents

This section describes how documents are used and shared with customers, suppliers and subcontractors throughout ProjectVIEW

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## 1 Introduction

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Although ProjectVIEW has a multitude of fields, grids and forms to hold and display information, it also recognizes the need for external documents. Examples of these are:

- ✓ VISAs
- ✓ Passports
- ✓ Plans
- ✓ Drawings
- ✓ Pictures

Since connected documents can be added in multiple locations within ProjectVIEW, this manual will explain the general functionality and best practices for the documents, which can be applied to all aforementioned cases.

## 2 Connected Document Location

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Some connected documents can be seen by intranet users; others by extranet users. Examples of the former are users from different departments within a company. Examples of the latter are suppliers and subcontractors using the company's web portal.

Since users connect using different networks, it is imperative for a shared location to be set up, which will host the connected documents.

In the first case, the shared location can simply be a location on a server, which can be accessed by all users. The users must also have the appropriate clearance to access said server or folder.

In the second case, the shared location must be on a cloud. Any cloud provider and setup can be used.

In case a connected document is stored in a local computer (e.g. personal computer, laptop etc) it will **only** be available for the user that has access to that location. **This should be avoided.**



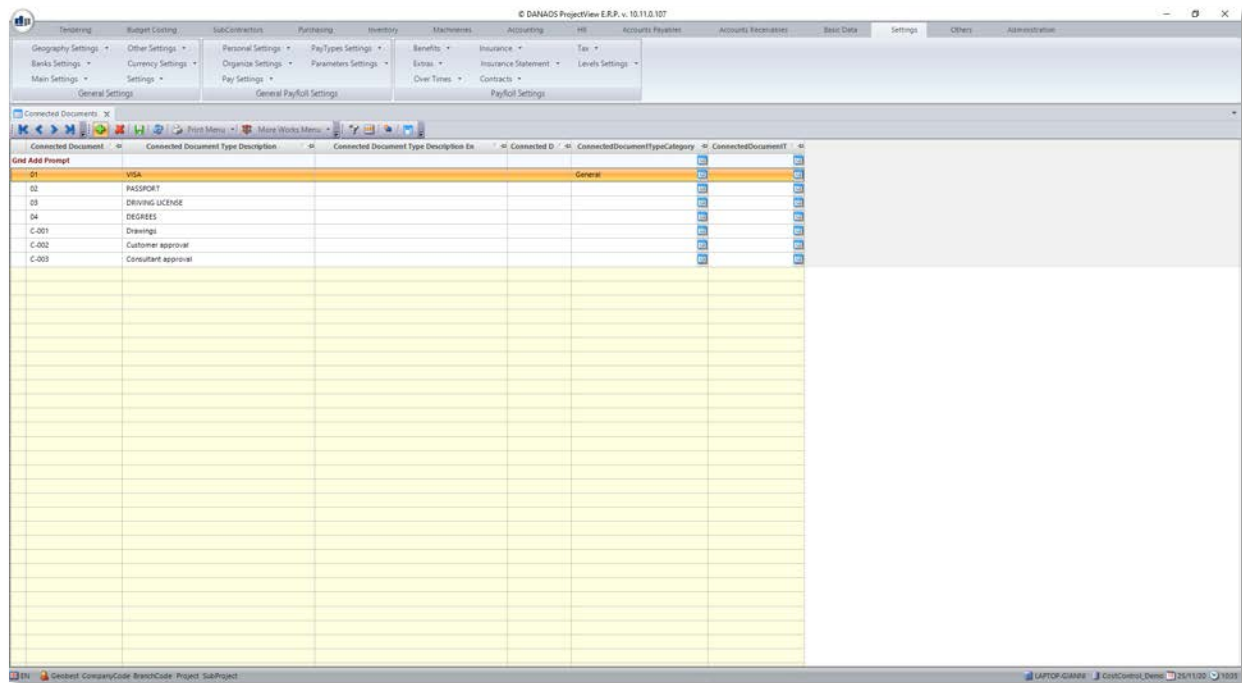
## 4 Connected Document Types

Connected documents are categorized by type. This is done to facilitate their sorting and filtering.

To view a list of the connected document types, the user must navigate to:

*“Settings” > “General Settings” > “Other Settings” > “Connected Document Types”*

A grid will be displayed listing all connected document types.



To add a new type or edit an existing one, the user can directly use the grid.



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