

www.project-open.com

]project-open[v3.0

Filestorage User Guide

Klaus Hofeditz and Frank Bergmann,
V1.4.1, 16.8.2005

INDEX

1	ABOUT THIS DOCUMENT	3
1.1	VERSION	3
1.2	SCOPE	3
1.3	AUDIENCE	3
2	ABOUT FILESTORAGE	3
3	STORING AND RETRIEVING MY FIRST DOCUMENT	3
3.1	LOCATE A SAMPLE FILESTORAGE	3
3.2	CREATE A TEST FOLDER	4
3.3	NAVIGATE TO THE TEST FOLDER	5
3.4	UPLOAD YOUR FIRST DOCUMENT	5
3.5	DOWNLOADING YOUR FIRST DOCUMENT	5
3.6	USING BREAD CRUMBS	5
3.7	EXTENDING AND MINIMIZING FOLDERS	6
4	WORKING WITH FOLDERS	6
4.1	CREATING A NEW FOLDER	6
4.2	DELETING A FOLDER	6
4.3	NAVIGATE TO A SUBFOLDER	6
4.4	RENAMING A FOLDER	6
5	UNDERSTANDING FILESTORAGE PERMISSIONS	7
5.1	ACCESS PERMISSION TYPES	7
5.2	USER PROFILES	7
5.3	USER ROLES	8
5.4	COMBINED PERMISSIONS	8
5.5	FILESTORAGE ADMINISTRATION PERMISSIONS	8
6	MODIFYING PERMISSIONS	8
6.1	DEFAULT PERMISSIONS	8
6.2	GRANTING PERMISSIONS	9
6.3	REVOKING PERMISSIONS	10
7	KNOWN LIMITATIONS	10

1 About this Document

1.1 Version

Version: 1.4.1, 16.8.2005

Author: Klaus Hofeditz and Frank Bergmann

Status: Preliminary

1.2 Scope

This manual describes how to share files within **]project-open[**.

1.3 Audience

The manual is written for users and project managers. We assume that you have basic computer skills.

2 About Filestorage

The **]po[-**Filestorage module allows groups of people to share files among each other. In combination with the **]po[-** FORUM module it provides the basic functionality for general online collaboration tasks.

A key element of online collaboration is the use of a single resource space by members of different business units or even users from external parties. However, most of these users should get access only to a subset of the stored files and therefore a certain level of security and the presence of access permissions is required.

The **]po[-**Forum is designed provide sophisticated protection mechanisms on the one hand and to allow convenient access to important resources on the other hand.

3 Storing and Retrieving my First Document

The following paragraphs will guide you through the process of uploading and downloading your first document in the Filestorage.

3.1 Locate a Sample Filestorage

Filestorages are associated with **]po[** Business Objects such as project, customers, providers, users, etc.

To complete the following steps you need to locate a sample Filestorage where you have full read and write permissions. In the case of the **]project-open[** default installation, please log in as "Ben Bigboss", go to the "Projects" tab and select the "Iteligent Software L10n" ("2004_0012") project from the list of projects. Within the project, please select the "Files" tab to see the projects' empty Filestorage (on a demo system, your Filestorage may already filled with some example files).

Please contact support@project-open.com if you should encounter issues to get to this point.

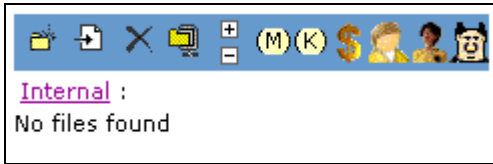



Figure 1: An empty Filestorage

As you hold your mouse pointer over the various icons, a help text will appear that explains the underlying functionality:

- Create a new folder
- Upload a file
- Delete files and folders
- Download files as a ZIP
- Add permissions to a folder
- Remove permissions from a folder
- Full Project Member
- Project Manager
- Customers
- Employees
- Freelancers
- Senior Managers

The exact meaning of all these items will be explained in the following sections.

3.2 Create a Test Folder

Create a sample test folder in this Filestorage by pressing the “Create a new folder” icon . Enter “Test Folder” in the following dialog and press the submit button.

New Folder

Please enter the name of the new folder


Comments? Contact: frank.bergmann@project-open.com

Figure 2: New Folder Dialog

3.3 Navigate to the Test Folder

Click on “Test Folder” to navigate to the test folder. Entering a folder will change the point of reference in the Filestorage and show only files in the current folder. Since there are currently no files located in the “Test Folder” you will see an empty list.

3.4 Upload Your First Document

Clicking on the “Upload a file”-icon  opens a dialog to upload a file to the server. Press the “Browse” button, select a sample file and press the submit button. A confirmation message appears after a few seconds if the upload was successful.




Filename:

Comments? Contact: frank.bergmann@project-open.com

Figure 3: File Upload Dialog

3.5 Downloading Your First Document

Press on the icon that represents the document type in front of the new document. In our example it has been an EXCEL file that is represented by the icon .

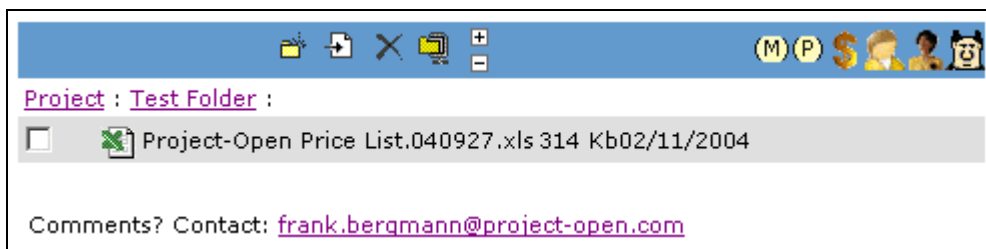


Figure 4: Filestorage with a single file in "Test Folder"

To download and save the file, please right click the icon and select “Save target as” (...or a similar function according to the browser you are using). A dialog appears to help you find the correct location on your local system.

3.6 Using Bread Crumbs

“Bread Crumbs” represent the path to the current file. The line “Project : Test Folder :” in the figure above represents the bread crumb that leads to the folder “Test Folder” within the project. Clicking on the “Project” link takes you back to the root of the FILESTORAGE.

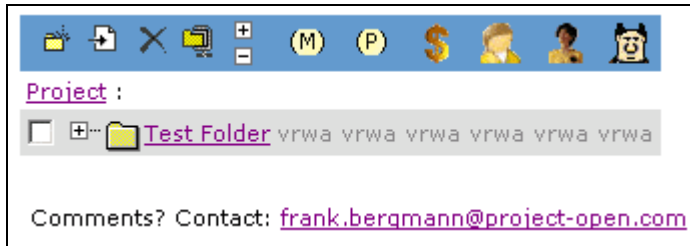



Figure 5: The project Filestorage with “Test Folder”

3.7 Extending and Minimizing Folders

[project-open] supports extending and minimizing folders similar to the Windows Explorer. Please click on the  symbol at the left of “Test Folder” to extend the folder and to make its content visible.

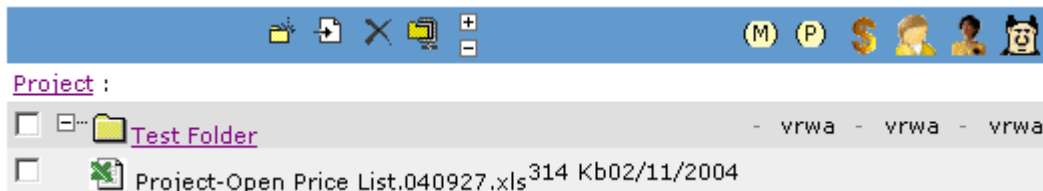



Figure 6: The project Filestorage with "Test Folder" extended


To minimize a folder, please click on the  symbol at the left of “Test Folder”.

4 Working with Folders

4.1 Creating a new Folder

Please refer to the previous section in order to learn more about the creation of a new folder.

4.2 Deleting a Folder

To delete one or more files or folder please select the files or folders using the checkboxes and press the  icon.

You cannot delete a folder with content. Folders need to be empty in order to be deleted.

4.3 Navigate to a Subfolder

You can navigate to a subfolder by clicking on its name.

4.4 Renaming a Folder

It is currently not possible to rename a folder. Please use the delete/create folder commands accordingly.

5 Understanding Filestorage Permissions

Permissions in the Filestorage module are a key element in opening up collaboration channels beyond a specific group, department or company. In the end they allow a tight integration of external project members such as the client or freelancers by giving them permissions only to the resources of the project they are supposed to access.

At the same time external members have the comfort of using the same interface as the core members of the project, which leads in the end to an optimized flow of information and high data integrity.

5.1 Access Permission Types

The following access permissions types can be defined for folders:

- **Admin Permissions**
Administration permissions allow a user to access content and modify permissions for other users
- **Write Permissions**
Allow a user to write, overwrite or delete contents
- **Read Permissions**
Allow a user to see the existence of files and folders and to access these contents
- **View Permissions**
Allow a user to see the existence of contents. View permissions are useful in the context of Knowledge Management, because an interested reader can ask the owner of the document or the project manager for specific read permissions.

The figure below shows our Test folder with the default “vrwa” (View, Read, Write and Admin) permissions for the profiles used in the project.







Figure 7: Our "Test Folder" with default permissions

5.2 User Profiles

User Profiles are used in IT systems to categorize user types. In **project-open** a user can be assigned to one or more user profiles. Based on profiles assigned to him he has access to the **po** resources.

The following user profiles are predefined in **po**:

- Employees 
- Customers 
- Freelancers 
- Senior Managers 

5.3 User Roles

User roles are similar to user profiles. Whereas profiles refer to certain groups of users, roles are specific to a main business object, e.g. the Filestorage. There are several predefined user roles for this business object:

- Full Member Full (M)
- Project Manager (P)
- Key Account Manager (K)

5.4 Combined Permissions

A user who possesses more than one profile or role is granted the union of the combined permissions. Consider a “Full Members” of a project who is also an employee. The resulting permissions are a union of the “Full Members” permissions and the “Employee’s” permissions.

5.5 Filestorage Administration Permissions

The project manager of a project has automatically administration permissions for the project’s Filestorage. These administration permissions allow the PM to see all contents and to set the permissions for other users, independent of the actual permission settings.

A similar rule applies to all other Filestorages such as the ones attached to companies, users, offices etc.

However, there is one notable exception with the “home Filestorage” on the first page of the system. The administration permissions for this Filestorage is controlled by the “edit_internal_offices” privilege in the “Admin” / “Profiles” menu.

6 Modifying Permissions




You need to have “Administrator” rights to be able to modify folder permissions.

6.1 Default Permissions

The permissions of a new Filestorage object are set to “vrwa” by default. This means that everybody by default can perform all actions on a Filestorage if he or she has permissions to view the project. Grayed letters indicate such default or inherited permissions. The figure below shows the default permissions of the “Test Folder”.

The permissive default permissions are only available until somebody explicitly grants permissions to at least one folder.

To grant access permissions please follow the following steps:

- # Add Permissions
- | | (M) | (P) | \$ |  |  |  |
|-------|--------------------------|-------------------------------------|--------------------------|---|---|---|
| View | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Read | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Write | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Admin | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
- Add Permissions
- Add the permissions above to the following directories:
- Directories
- ☒ Test Folder
- Comments? Contact: frank.bergmann@project-open.com


The figure below shows the result of this action.

“Admin” permissions automatically imply “View”, “Read” and “Write” permissions.



Figure 10: A Filestorage with view, read, write and admin permissions for “Project Managers”, “Employees” and “Senior Managers”

6.3 Revoking Permissions

Permissions are revoked using a similar procedure. Pressing the  button .

Revoking “View” permissions automatically implies the revocation of all other permissions. Revoking “Read” or “Write” permissions implies revoking “Admin” permissions as well.

7 Known Limitations

- Non-ASCII characters:
You can’t use non-ASCII characters for file names. This limitation is due to how Linux (and CygWin on Windows installations) deals with non-ASCII characters.



Ronda Sant Antoní, 51 1º 2a
08011 Barcelona, Spain
Tel.: +34 93 325 0914
Fax.: +34 93 289 0729