

Documents

- [Documents Overview](#)
- [Print Templates](#)

Documents Overview

Documents are used to store and share revisions of files in Atollon folders.

Document Listing

It is possible to browse documents using Documents application in tree or list view.

Document Details

Each document may have description, Type, Category or Location.

Document Versions

Once you upload new document with the same name into Atollon's folder, new document revision is automatically created.

Multiple Documents Upload

It is possible to upload several documents at the same time.

Document Content Search

It is possible to search for any document, incl. content of the file, which has been recognized by Atollon. Atollon recognizes all major office documents, such as MS Word, MS Excel, MS PowerPoint, Open Office document formats, RTF, TXT, HTML or even PDF. Document's contents is indexed in database for faster search.

Sending Document

Document may be sent using right-click (contextual pop-up) on each document. If Finder Folder (or project) is recognized, it is automatically pre-filled. By default, the document is sent internally, but it is possible to easily switch the message type to E-mail and send it outside Atollon.

Document Folders

Documents are stored in Finder Folders as well as special document folders, which may be used only for the purpose of storing documents. Document folders may be created even under any Project.

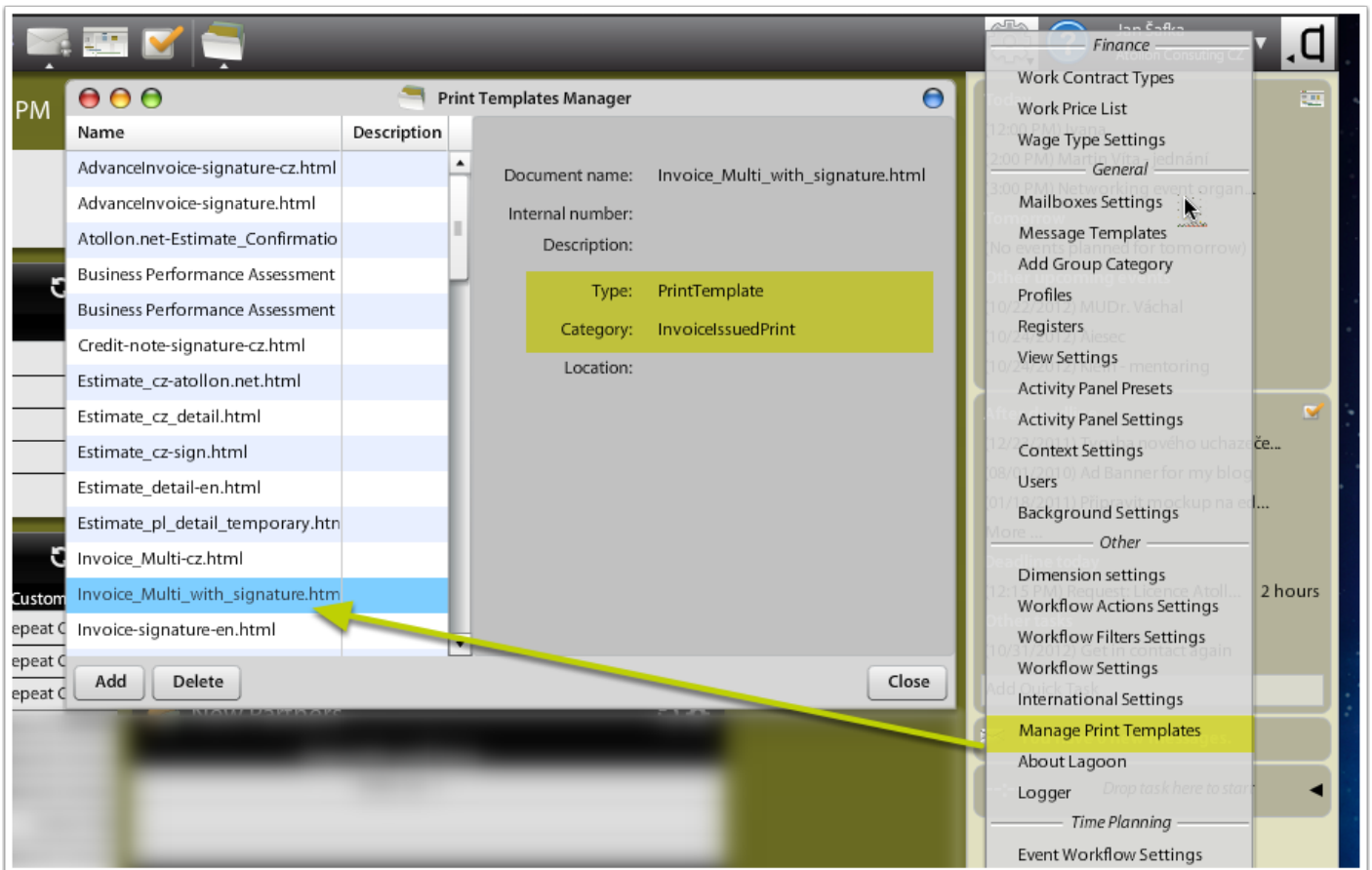
Document Access Rights

Access rights of particular documents may be customized individually. Their default access rights are taken from the folder, in which they are stored. For instance if document is stored under Project, project's access rights are applied, etc.

Print Templates

Uploading New Print Templates

To open the **Manage Print Templates** dialog, go to **Options & Tools > Manage Print Templates**.



Using this tool you may upload 2 types of templates:

a) XHTML print template

These templates are designed for the purpose of printing and converting to PDF. It can be simple XHTML-compliant document, but may also incorporate data gathered from Atollon.

b) XLS template

Atollon supports generating MS Excel output from Atollon data.

Document Type

When uploading the Print Template, it must be set (by default) to "PrintTemplate" Document Type.

Document Category

The Print Template document must be assigned to appropriate Document Category. Print dialogues in Atollon filter Print Templates based on Print Categories. For example in order to print Estimate, you must upload template into *EstimatePrint* it's Document Category.

In order to get list of print categories, go to [Print Template Categories](#) page.

Print Templates Design

To learn more about Print Template Design, read [Mooring Templating Guide](#). Using Atollon Logger application, you may get PrintJob data available to the Print Template. All data that are available in PrintJob may be used in output.

To learn more about exporting into Excel, read [Excel Templating Guide](#).

Download Sample Print Templates

You may be provided with public sample print templates for free. For that please contact atollon or your implementation partner.