SKYDOC

tvarana

SkyDoc

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ABOUT
TVARANA

Tvarana started in 2007 focusing on cloud-based enterprise applications.

Over the years, Tvarana has evolved as a NetSuite SDN Partner and has successfully completed over 500 projects involving customization, cloud integration and app development.

Tvarana specializes in offering cloud solutions to users of ERP and CRM platforms and has experience over technologies like NetSuite, Salesforce.com and IPAAS solutions such as Dell Boomi, MuleSoft and Celigo.

Tvarana currently has a 70+ member dedicated NetSuite team, and 8 apps listed on suiteapp.com.

SkyDoc

SKYDOC
OVERVIEW

SkyDoc is a document management solution that enables internal and external collaboration and document sharing. This "Built for NetSuite" verified solution finds its origin in the necessity to make file management on NetSuite a simpler, more user-friendly process.

Skydoc expands on NetSuite's file storage capabilities by leveraging the power of Amazon Web Services (AWS). It connects the Simple Storage Solution (S3) from AWS to NetSuite using APIs in both applications. Users can now leverage NetSuite for business process automation, and AWS for inexpensive data storage through Skydoc.

UPLOADING
FILES

- SkyDoc is present in all records as a subtab
- Open any record and navigate to SkyDoc subtab
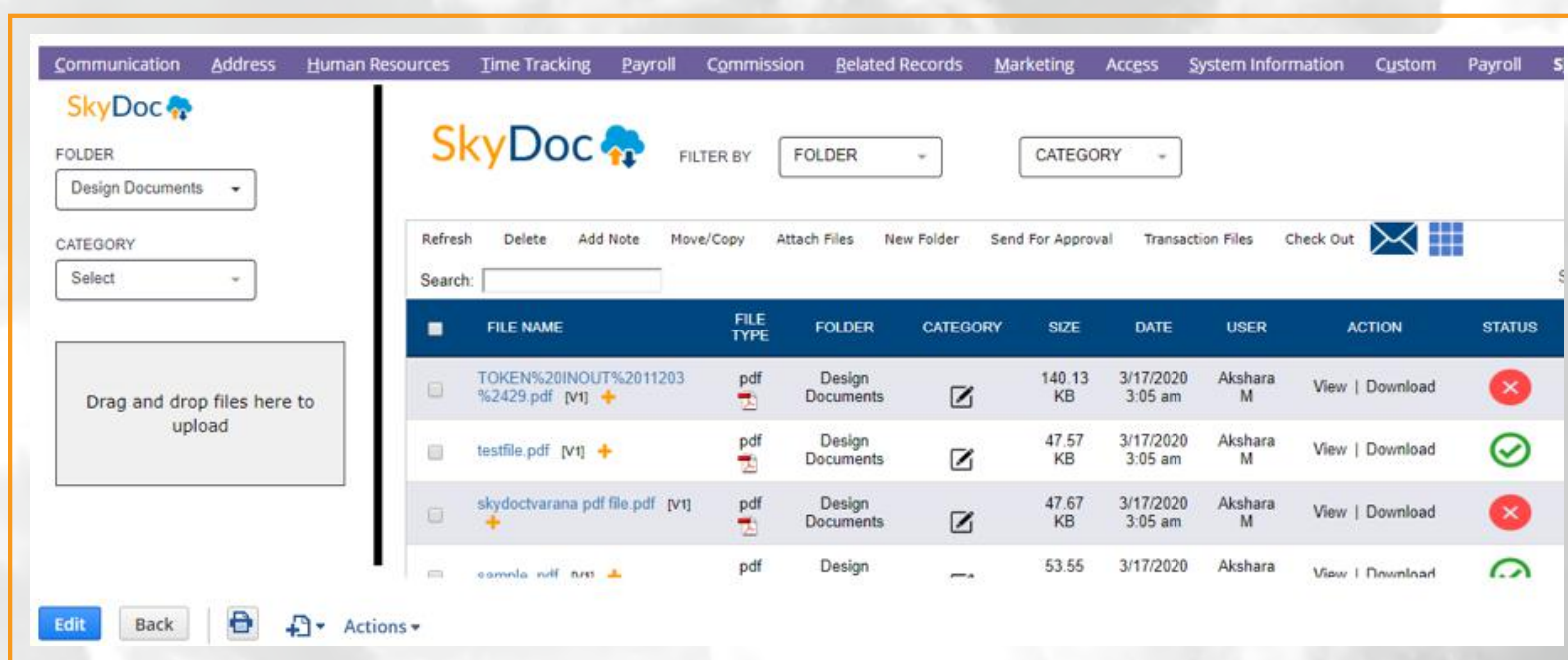
- In the upload area, select **Folder** and click on **Drag and drop files here to upload**. You can manually drag and drop files as well
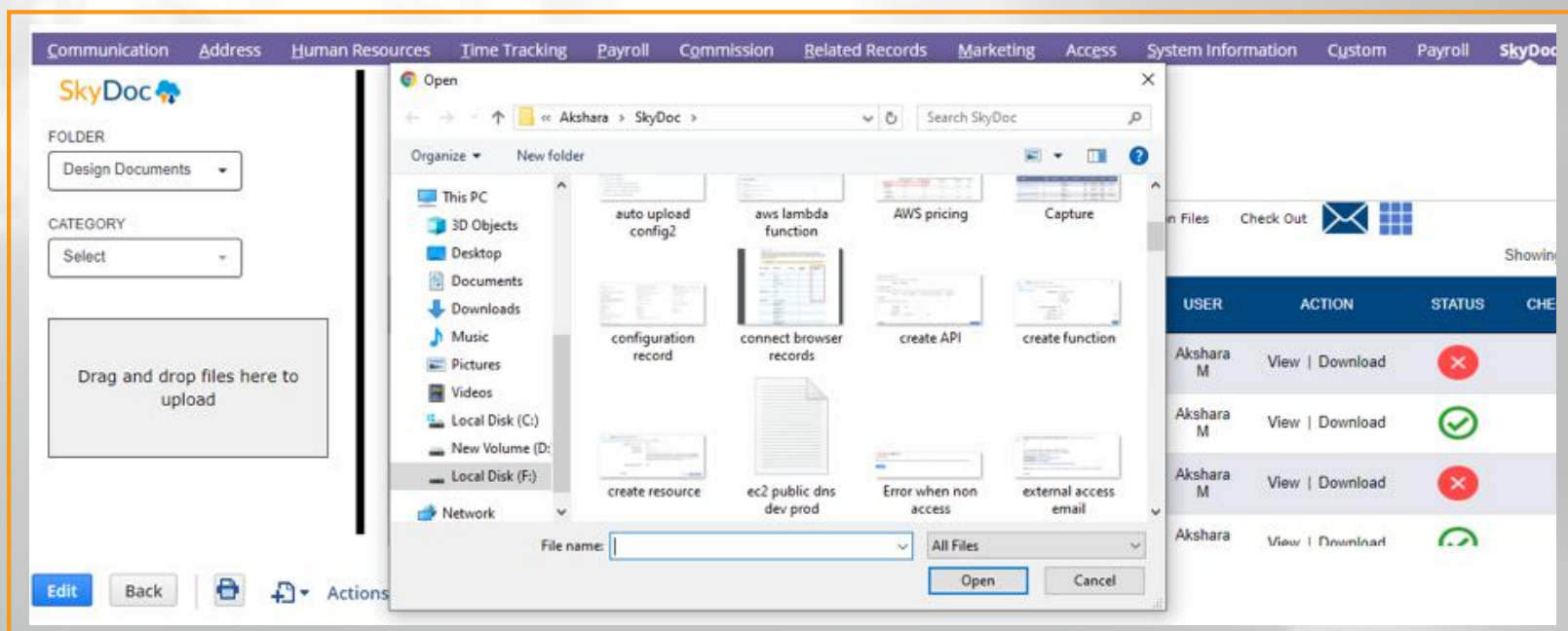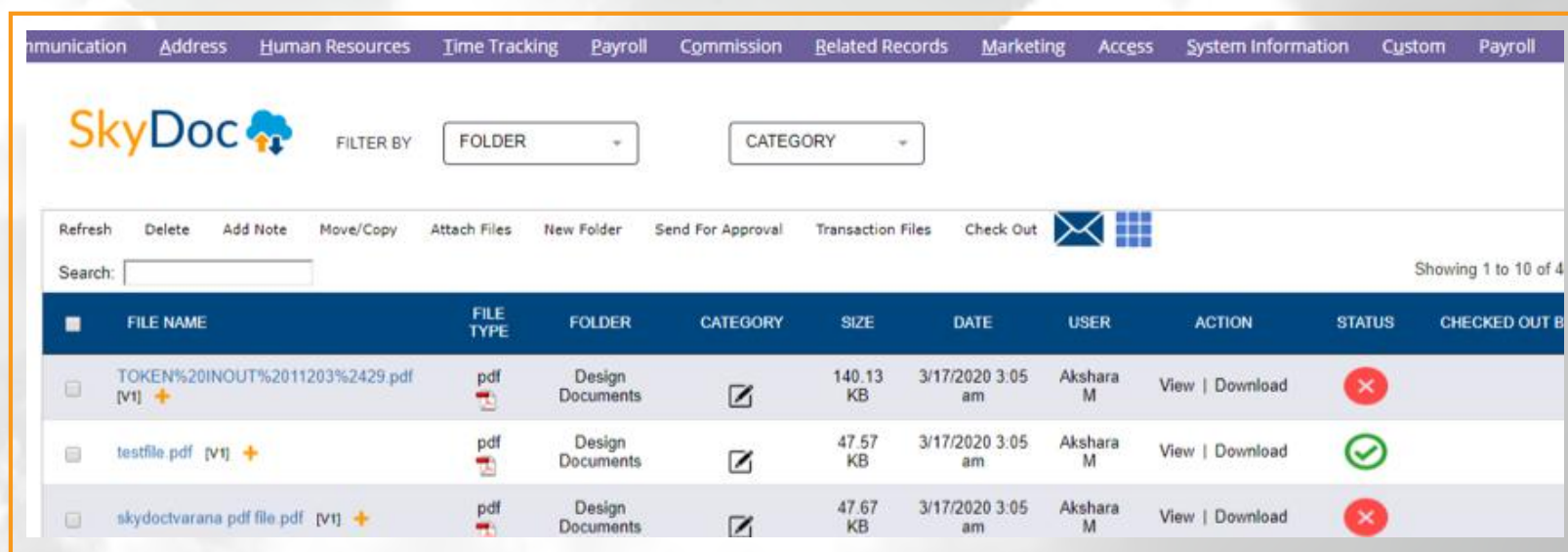

SkyDoc

Note:

- The default folder for uploading files can be selected based on the account subsidiary. In order to do so, navigate to **Documents** > **SkyDoc Folders** > **SkyDoc Folders List** > **Edit any Folder**, and select a subsidiary name in the **Subsidiary** field (This is a one-time setup available only for Netsuite Oneworld accounts)
- Multiple files can be uploaded at once
- File upload status can be seen in the upload pane
- Selecting a folder while uploading a file is required, while selecting a category is optional

DISPLAY
LIST

SkyDoc Display List displays all files uploaded in a record

- It has folder and category dropdown lists to filter files
- A search bar to search for files
- A dropdown list to choose the number of entries to be displayed per page
- A series of buttons to perform various actions
- A download icon to download files
- All details of the file such as name, folder, category, size, date, status etc. are shown

PREVIEW

Preview a file by hovering your mouse over the name of the file
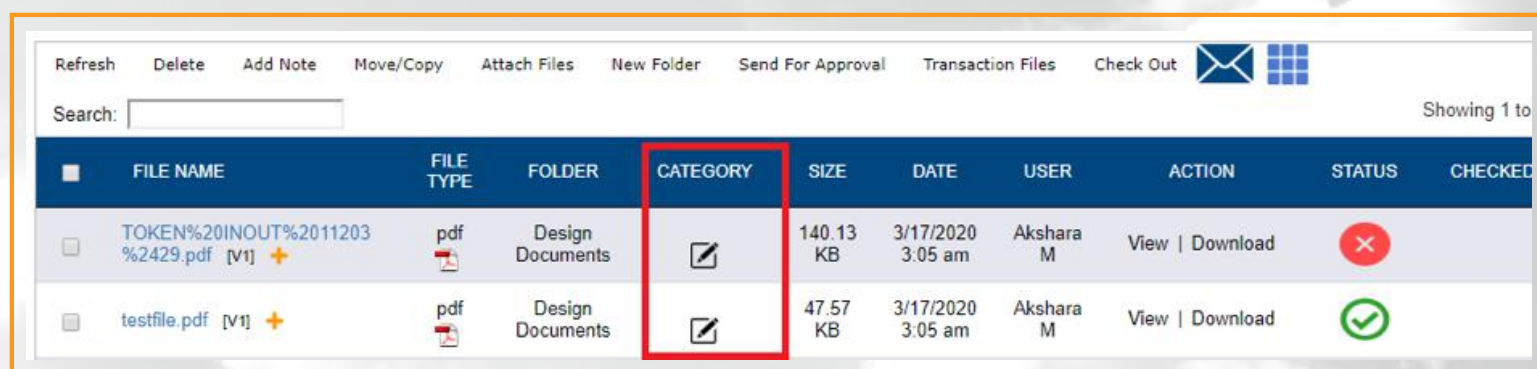
SkyDoc

VERSIONING

If the same file is uploaded more than once, then SkyDoc maintains versions instead of overwriting the existing file

VIEW

View link in the SkyDoc display list is used to view the contents of a file

UPDATING
CATEGORIES

To update the category of uncategorized files, click on the **Edit Category** icon in the SkyDoc display list and select one or more category
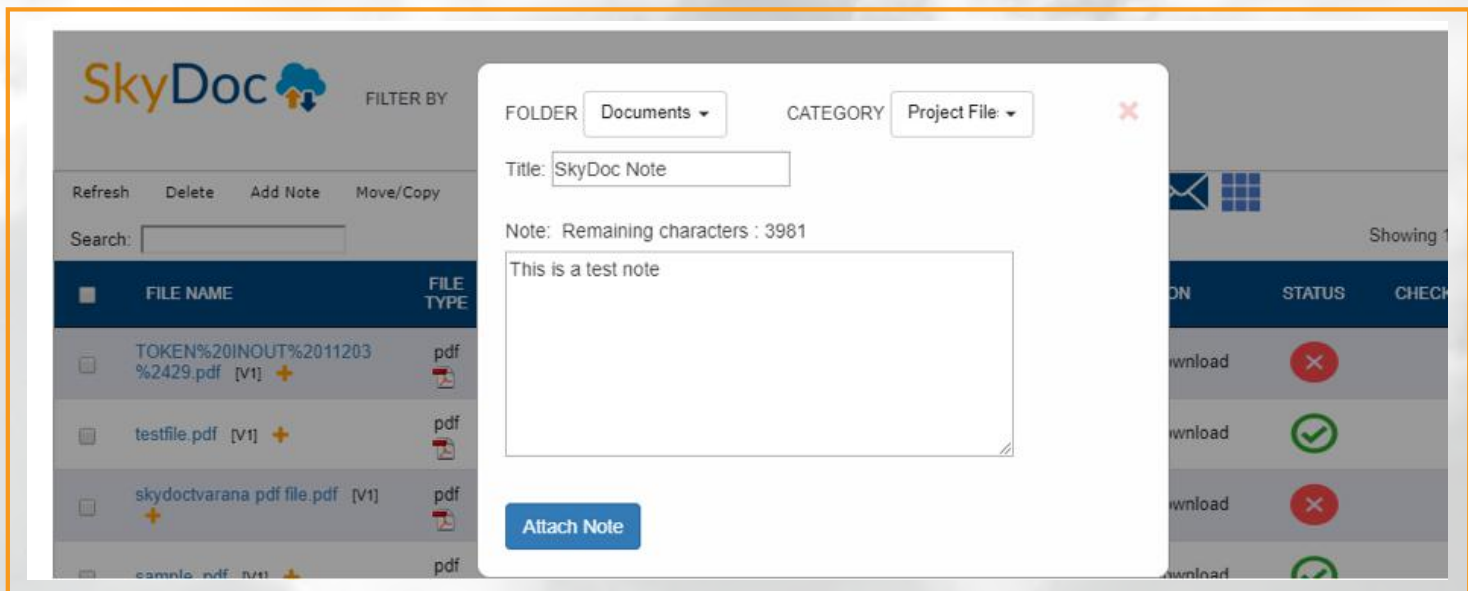

Clicking this icon shows a category drop displays a pop-up. Select a category/categories and click on the **Submit** button

ADD
NOTE

The **Add Note** button is used to add notes. Click on this button, select **Folder** and **Category** and add a title for the note. Enter your description and click on **Attach note**. Alternately, click on the **+** symbol next to the file name to add a note.

SkyDoc

COPY

The **Move/Copy** button in SkyDoc tab is used to move/copy the files between records

- In order to move/copy a file, make your selection by checking the check box next to the file and then on the **Move/Copy** button
- Select the record type and click on the **Search** button
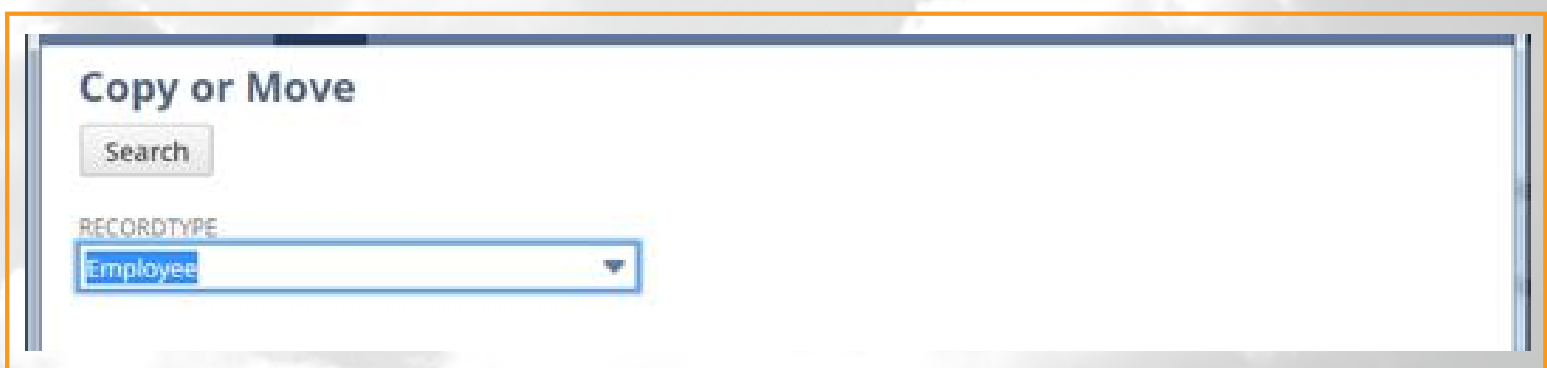
- Select the copy (or) move action, choose the target record and click on **Save**
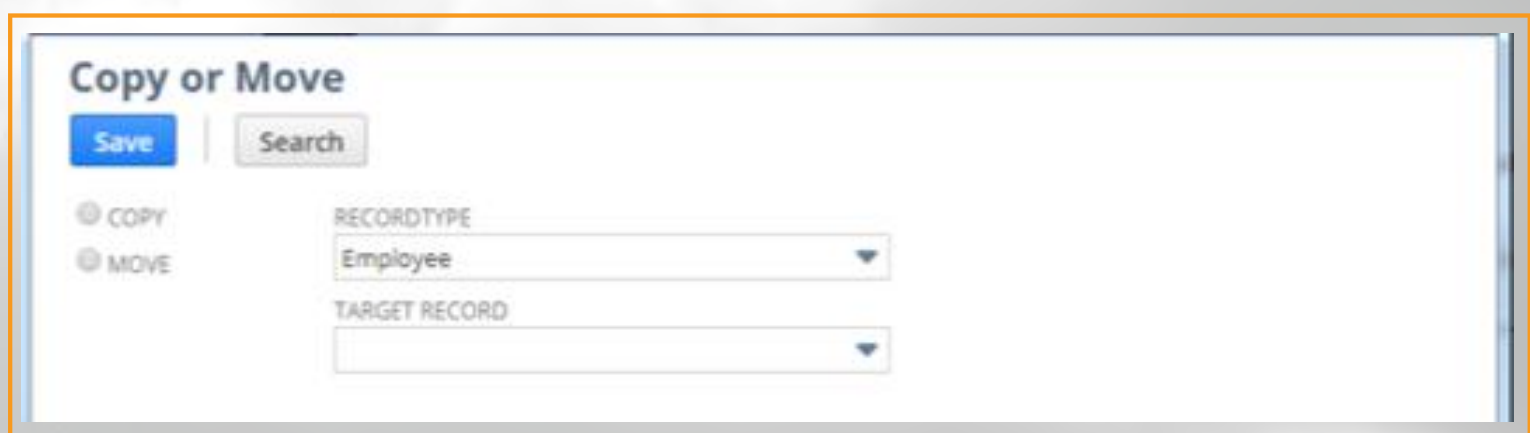
ATTACH
FILES

To attach externally uploaded files to any record, click on **Attach Files**

SKYDOC
GALLERY

Clicking this button allows you to view image files in the SkyDoc Display List.
This feature can be used only for images

AWS S3
FILE RECORD

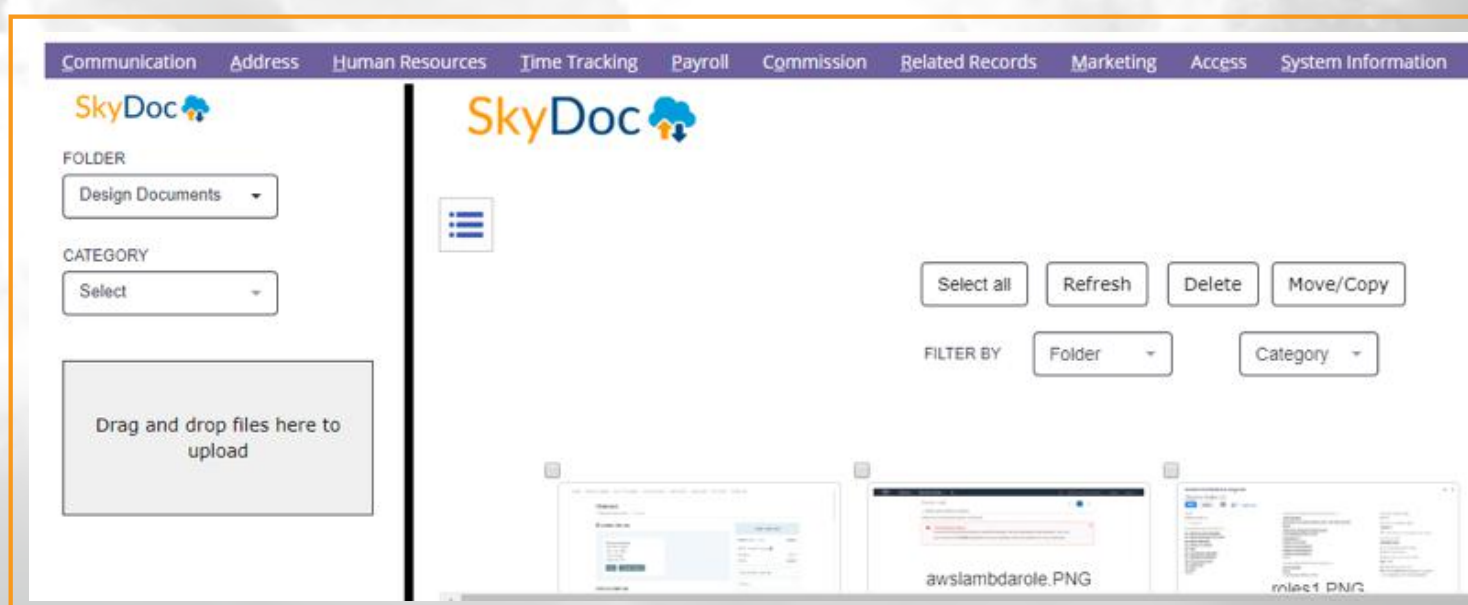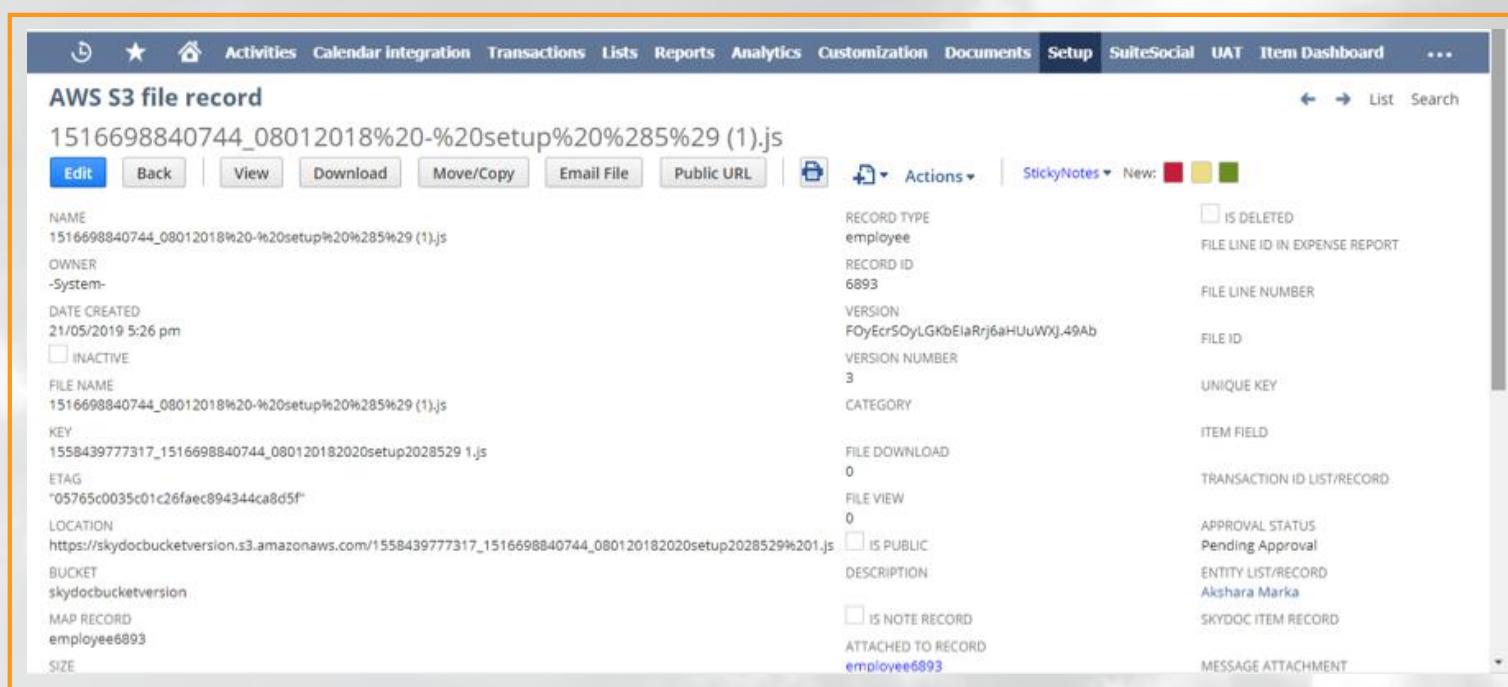The AWS file record is the link between AWS and the SkyDoc tab, created each time a file is uploaded. It contains details such as number of file downloads, file views, the record that the file attaches to, type of entity, status, etc.

- Click on file name in the SkyDoc display list to open the AWS S3 record of the file
- Buttons to perform certain operations like view, download, move/copy, etc. are available
- File details can be edited by clicking on the **Edit** button
- **View** button can be used to view the file content
- **Download** button is used to download the file
- **Move/Copy** button performs the same action as in the SkyDoc display list. First click on the button, select the record type and click on **Search**. Then select the Target Record and click on **Save**
- The URL in the **Location** field can be made public by clicking on the **Public URL** button
- If the record is private, attempting to copy the link and run it returns the error **AccessDenied**
- Clicking the **Public URL** button and then running the url in the location field displays the file content. By doing so, the **IS PUBLIC** field in the AWS S3 record is enabled
- The record url can be once again made private by clicking on **Private URL** button.

SkyDoc

EMAIL

SkyDoc files can be attached to an email in two ways:

1. By clicking on the **Email file** button in AWS S3 record
2. By clicking on the **Email button** in the **Communication** subtab of any record

Using the "Email File" button in the AWS S3 record

- Click on the **Email file** button
- Enter email details like subject, recipient email, message; and if any email template is to be used, check the **Enable Email Template** checkbox to use any one of the scripted template listed in the dropdown. Email can be sent to multiple comma-separated email addresses.
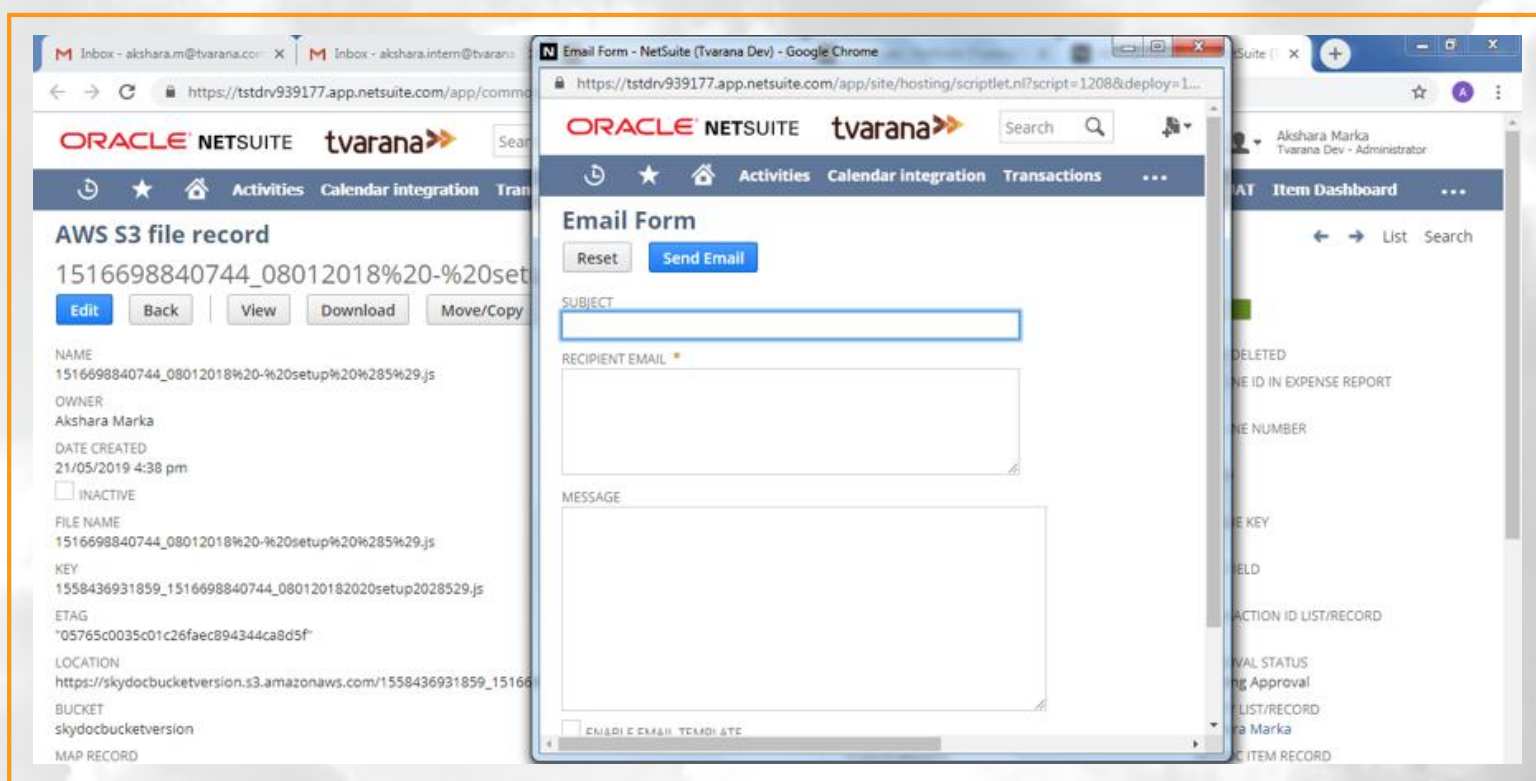
- Click on **Send Email**. Email will be sent to the recipient
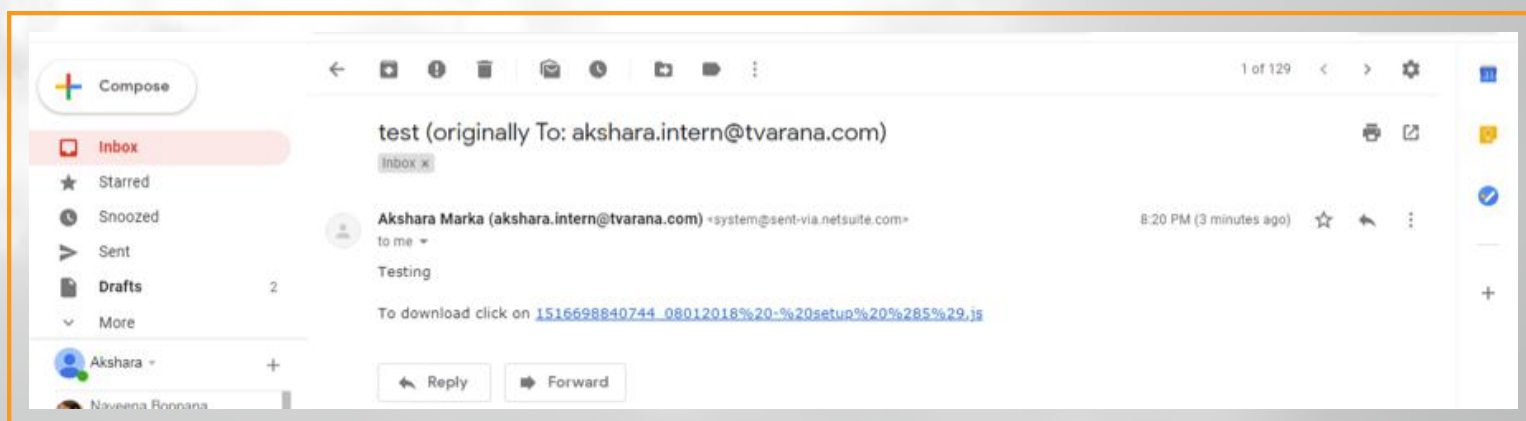
- The file can be downloaded by clicking on the link

SkyDoc

Using the "Email" button in the Communication subtab of a record

- Click on the **Email** button in the **Communication** subtab
- Enter email details like recipient, subject, message, etc. Email can be sent to multiple comma-separated email addresses.
- Attach your files in **SkyDoc Files** subtab
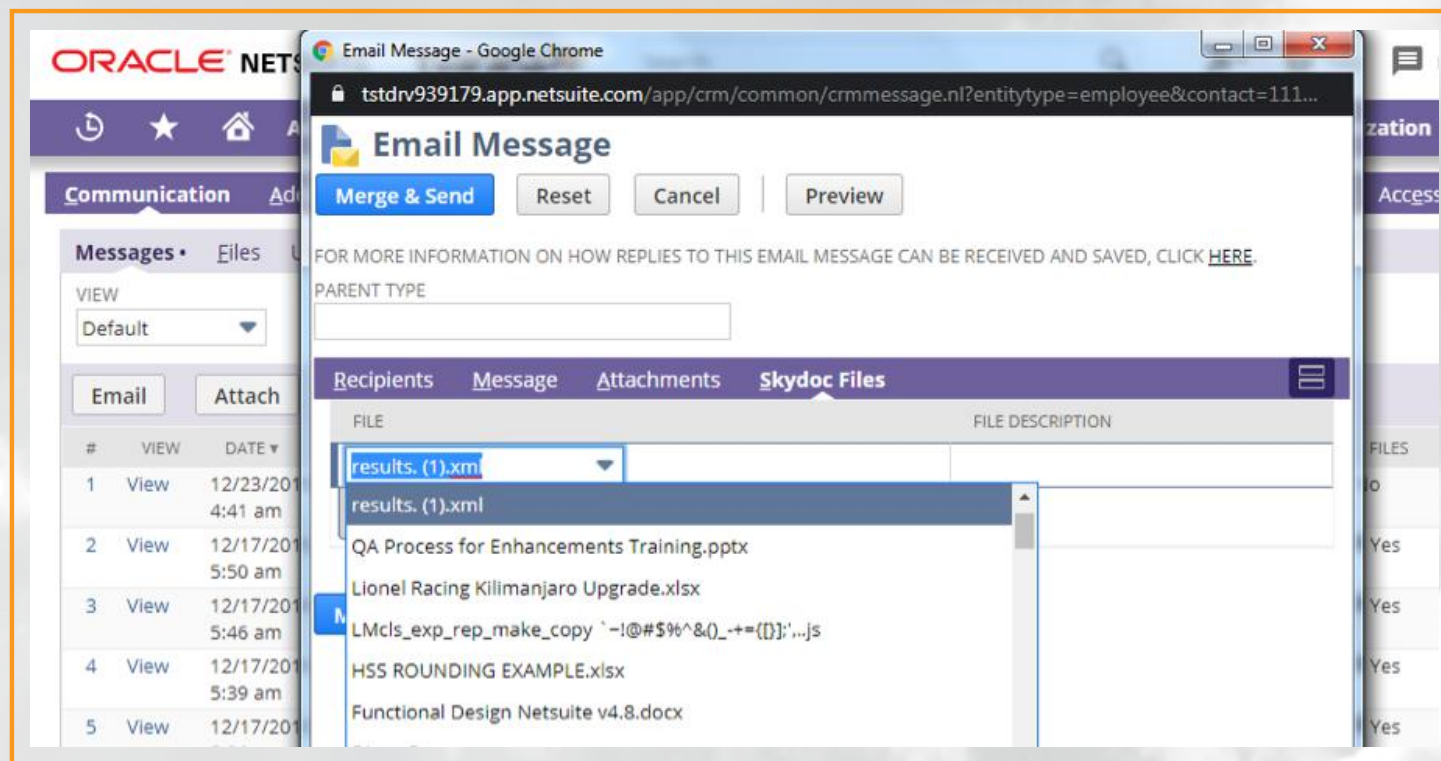
- Click on the **Merge & Send** Button. Email will be sent to the recipient
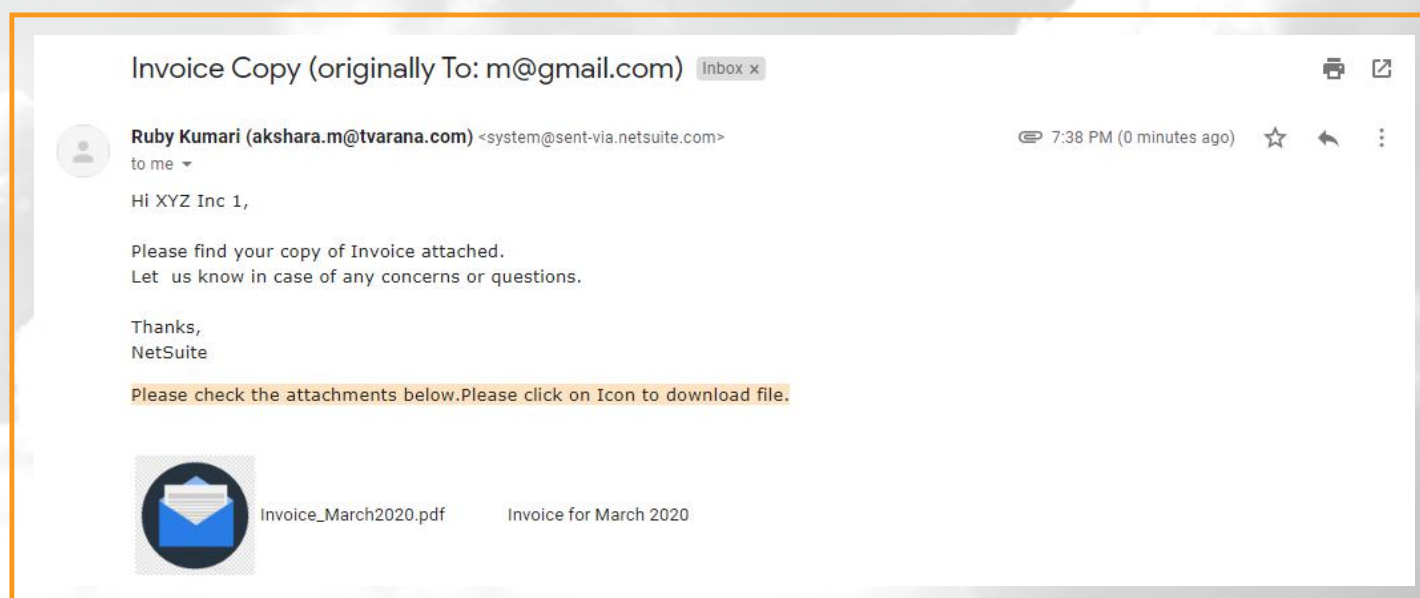
- The file can be downloaded by clicking on the icon

SKYDOC
FOLDERS LIST

SkyDoc Folders are used to store files.
To create a new folder, use the navigation **Documents** > **SkyDoc Folders** > **SkyDoc Folder List** > **New**

- Enter the name of the folder
- If this is a sub folder of any folder, select the folder from the dropdown list
- If this folder is to be restricted to any particular IP address, then enter the IP address
- **Access to Folder** field is used to restrict the folder access only to the selected users
- **Access to All Employees** checkbox is used to give access to the folder for all the employees
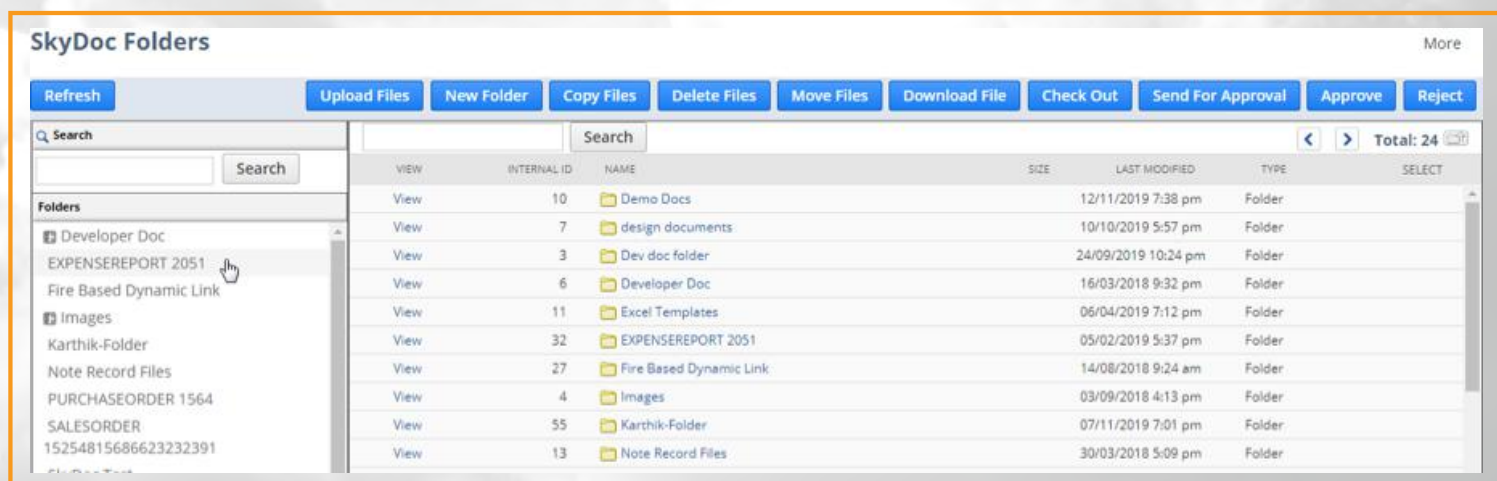- **Saved Search Employee Access** field is used to give access to users based on saved search results
- **Public:** This field makes the folder public, and all files uploaded to this folder are public by default
- **SkyDoc Portal Access:** This subtab in the SkyDoc Folder page is used to give a SkyDoc External Portal user access to the created folders

SKYDOC
FOLDERS

In order to see all folders and their contents in a single place, follow the navigation **Documents** > **SkyDoc Folders** > **SkyDoc Folders**

This page is a replica of the file cabinet and is used to view all the folder contents in a single place, as well as perform operations such as upload files, creating a new folder, delete files, copy and move files between folders, check out files, send files for approval and download files

SKYDOC FILE
CATEGORY

SkyDoc File categories are used to differentiate files within a folder.
To create a new category, use the navigation **Documents** > **SkyDoc Folders** >
SkyDoc Files Category > **New**

SKYDOC
PORTAL

- SkyDoc Portal allows collaboration between NetSuite users and those with no NetSuite access, such as vendors and contacts
- Files are uploaded to the SkyDoc tab in Netsuite and can be approved/rejected by external users
- In order to use SkyDoc external portal, an author (user who provides access to external contacts) must be assigned for every email sent in the approval process
- This is a one-time setup, and can be done by following the navigation **Setup** > **Company** > **General Preferences** > **Custom Preferences**

SkyDoc
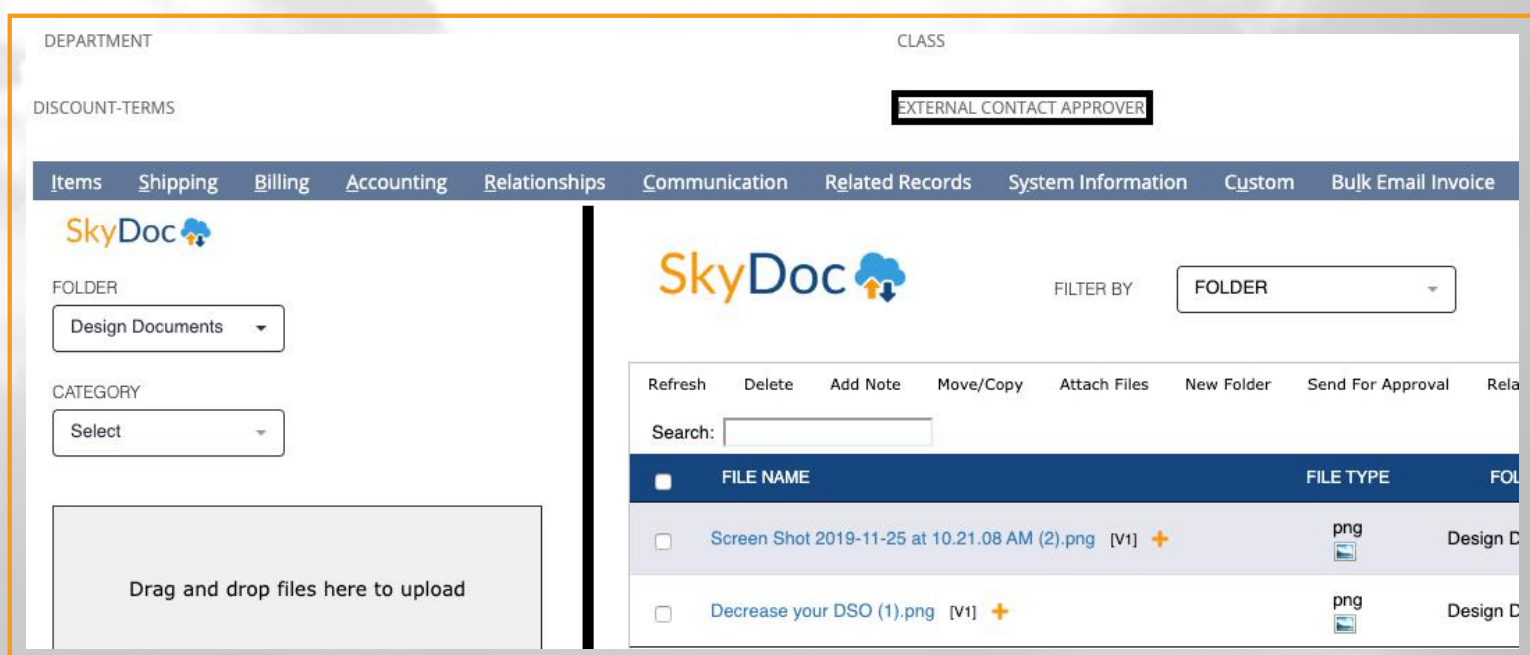
- To send a document for approval, update the **External Contact Approver** field
- Click the **Send for Approval** button

- External contacts see the screen below on the portal. Here, they can view files sent to them, add comments, and approve or reject files

SKYDOC
SETUP

Use the navigation **Setup** > **SkyDoc** > **SkyDoc Setup**
The following fields can be seen in Setup page:

- **ACCESS KEY:** This field contains the access key of the AWS account
- **SECRET KEY:** This field contains the secret key of the AWS account
- **BUCKET:** This field contains the bucket name under which files are stored in the AWS account
- **GOOGLE URL SHORTENER API KEY:** This field contains the Google URL shortener which shortens the URL of SkyDoc files
- **SKYDOC LABEL:** Label of the SkyDoc tab which is visible in all records
- **REGION:** This field contains information on the region of the bucket

The following **checkboxes** can be seen on the SkyDoc setup page:

- **ENABLE DOWNLOAD LINK:** When enabled, the download link can be seen in the display list.
- **DISPLAY FOLDER ON LIST:** When enabled, the folder dropdown can be seen in the display list
- **ENABLE CATEGORY:** When enabled, the category dropdown can be seen in the display list
- **ADD NOTE ON LIST:** When enabled, the **Add note** button can be seen in the display list
- **ADD MOVE/COPY ON LIST:** When enabled, the **Move/copy** button can be seen in the display list
- **SKYDOC EXTERNAL ACCESS:** Enabling this allows files to be downloaded externally
- **ENABLE DRAG AND DROP IN LINE LEVEL:** Checking this allows SkyDoc drag and drop in Line Item Level
- **ACCESS TO FOLDERS PAGE:** Checking this allows access to SkyDoc Folders page.
- **ENABLE MERGE PDF:** Checking this enables merging of multiple PDF files into a single PDF file
- **ENABLE SKYDOC GALLERY:** Checking this enables Grid View in the SkyDoc tab.
- **ENABLE VIEW IN SKYDOC LIST:** Checking this field enables the View Column in SkyDoc tab
- **ENABLE FOLDER ON RECORD:** Checking this allows users to create folder from a record

- **ENABLE APPROVAL WORKFLOW:** Checking this allows users to view the status column in the SkyDoc tab
- **ENABLE INLINE CATEGORY:** Checking this allows users to select a category for an AWS record in the SkyDoc tab
- **ENABLE DOCUMENT CHECK OUT:** Checking this enables Document CheckOut feature for SkyDoc
- **ENABLE MULTIPLE CATEGORY**: Enable this Field to select multiple categories
- **DELETE EXPENSE REPORT LINE LEVEL FILE:** Enable this field for deleting Expense Report line level Netsuite files to SkyDoc

The following **dropdown lists** can be seen on the SkyDoc setup page:

- **UPLOAD TOOL:** Folder selected here is used for any external tools are used to upload Data to SkyDoc
- **ATTACH TO FOLDER:** The folder selected here is displayed in the **Source Folder Field** in the **Attach Files** page. Displays the unattached files of the selected folder in Attach Files Page
- **SKYDOC UPLOAD FOLDER:** The folder selected here is considered as default folder while uploading files to SkyDoc
- **SKYDOC PAGE LENGTH:** This field displays the number of files to be displayed in SkyDoc display list

SKYDOC
ROLES

- Go to **Setup** > **SkyDoc** > **SkyDoc Roles**

This page is used to setup permissions for roles to perform various actions like admis, upload, view, delete, attaching files, move/copy and accessing SkyDoc folders page.

SkyDoc Admin: This role has access to SkyDoc forms like SkyDoc setup, SkyDoc Roles and External access pages

Upload Roles: This role has permission to upload files in SkyDoc

View Roles: This role has permission to view files in SkyDoc

Delete Files: This role has permission to delete files in SkyDoc

Attach Files Roles: This role has permission to attach files in SkyDoc

Move/Copy Roles: This role has permission to move or copy files in SkyDoc

Folder Roles: This role has permission to view SkyDoc Folders Page

Checkboxes:

FOLDER PERMISSION: Check this box to restrict SkyDoc folders to logged in user based on permissions assigned in the SkyDoc Folder Record
DISPLAY CATEGORY IN SKYDOC LIST: Check this box to display category column for the file list in the SkyDoc tab

Text fields:

IP RESTRICTION: Grant access to the SkyDoc External Links based on the IP. Separate multiple IPs with commas
SKYDOC FOLDER LABEL: Enter the label for Folder field and also for Folder column in SkyDoc
SKYDOC CATEGORY LABEL: Enter the label for Category field and also for Category column in SkyDoc

Dropdown lists:

EXTERNAL ACCESS FOLDER: By default files uploaded to the external access page are stored in this selected folder
SKYDOC LINE LEVEL FOLDER: Select the folder to store line level item files
SKYDOC FORM LEVEL FOLDER: Select the folder to store Form Level Drag and Drop files
EXPENSE REPORT DEFAULT FOLDER: Select the folder to be default on expense report (files are restricted to other users)

THANK YOU!

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SkyDoc