

**BEST
PRACTICES**

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 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.

This document covers tips on how best to use SkyDoc.

SKYDOC FOLDER ACCESS USING SAVED SEARCH

Users can be given access based on saved search results from the **Saved Search Employee Access** field in the SkyDoc Folders record.

This feature allows you to easily view who has access to the folder. Whenever a new employee fits the criteria of the saved search they will automatically be granted access to the folder, saving you the time when onboarding.

Take for example, granting folder access to the administrators of an account:

- Create a saved search for the administrators of the account
- Navigate to **Documents > SkyDoc Folders > SkyDoc Folders List**. Open any SkyDoc folder and retrieve your saved search from the **Saved Search Employee Access** field

SkyDoc Folders Expense Report Docs

Save Cancel Reset Change ID Actions

NAME *
Expense Report Docs

☐ INACTIVE

SUBFOLDER OF

ACCESS TO FOLDER
<Type & tab for single value>

☒ ACCESS TO ALL EMPLOYEES
SAVED SEARCH EMPLOYEE ACCESS

☐ PUBLIC

Notes Workflow SkyDoc Portal Access

User Notes System Notes

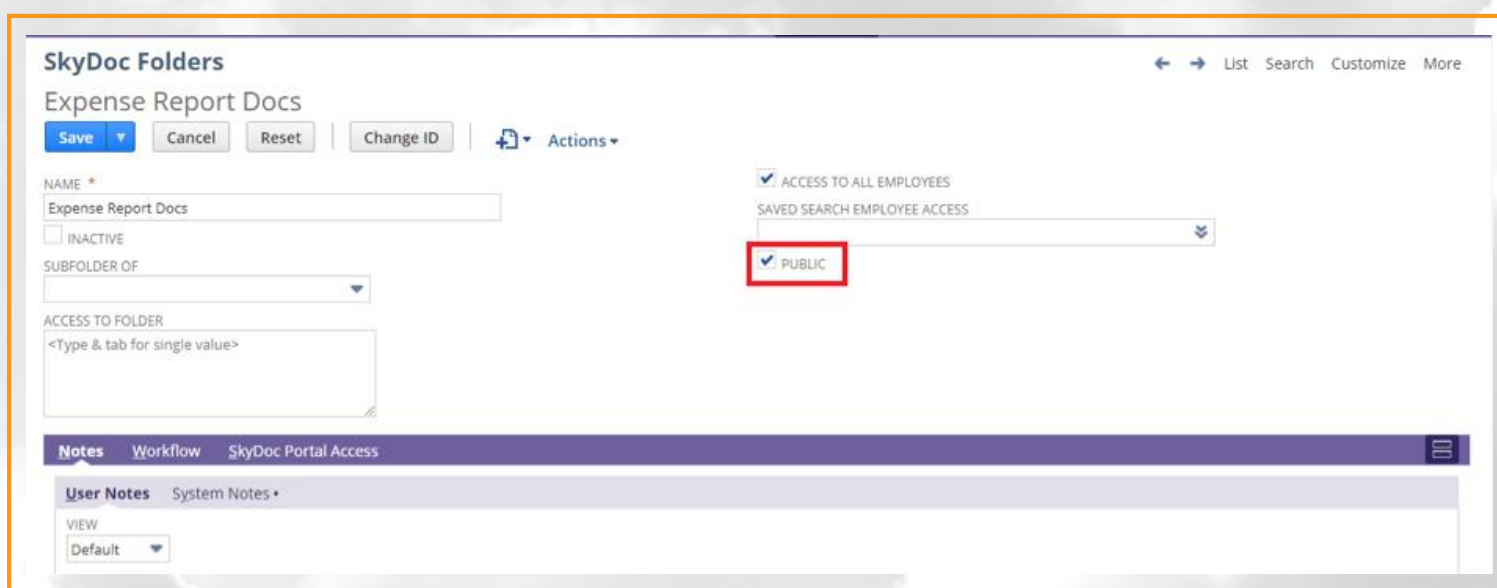
VIEW
Default

- After selecting the search and saving the record, newly added users will be seen in the **Access to Folders** field
- *Note:* A script runs every 30 mins to update newly added users, so folder access will not be available immediately after adding a user

MAKING A FOLDER PUBLIC

If the files uploaded to a particular folder need to be made public, rather than doing so from the AWS record, you can achieve this by making a SkyDoc folder public.

In order to make the SkyDoc folder public, navigate to **Documents > SkyDoc > SkyDoc Folders List**. Open any folder and check the **Public** checkbox.



The screenshot shows the 'SkyDoc Folders' configuration interface. The folder name is 'Expense Report Docs'. The 'PUBLIC' checkbox is checked and highlighted with a red box. Other options include 'ACCESS TO ALL EMPLOYEES' (checked), 'SAVED SEARCH EMPLOYEE ACCESS' (dropdown), 'INACTIVE' (unchecked), 'SUBFOLDER OF' (dropdown), and 'ACCESS TO FOLDER' (text input). The bottom section shows 'Notes', 'Workflow', and 'SkyDoc Portal Access' tabs, with 'User Notes' and 'System Notes' sub-tabs and a 'VIEW' dropdown set to 'Default'.

Doing this makes all files uploaded to this folder public by default

CHECKOUT

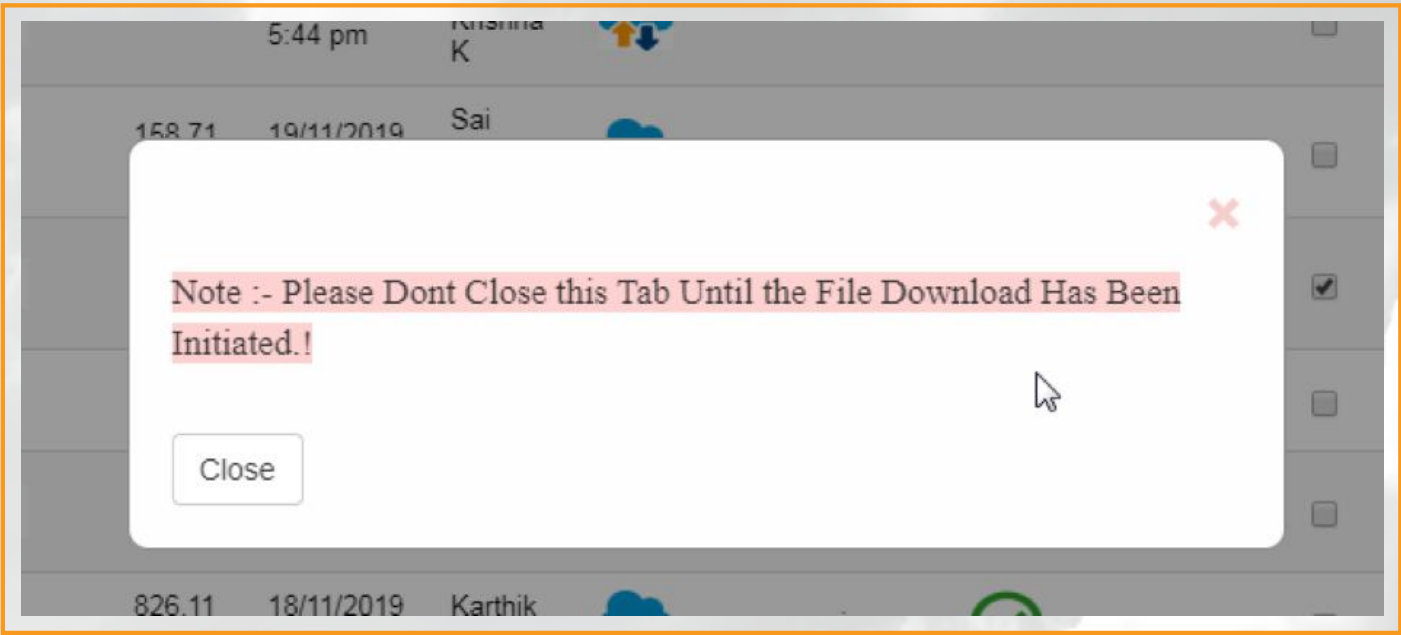
The checkout feature allows users to see when a file is being viewed/edited by someone else. This feature prevents multiple people from working on the same file simultaneously.

To use the checkout feature:

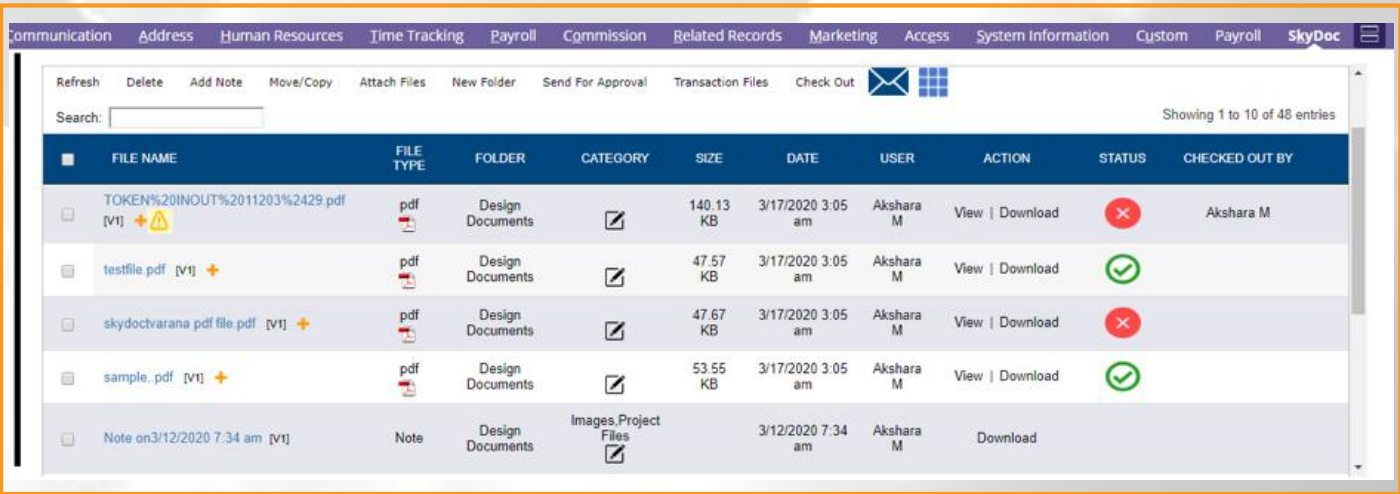
- Upload a file in the SkyDoc tab of a record
- Select the file and click on the **Checkout** button



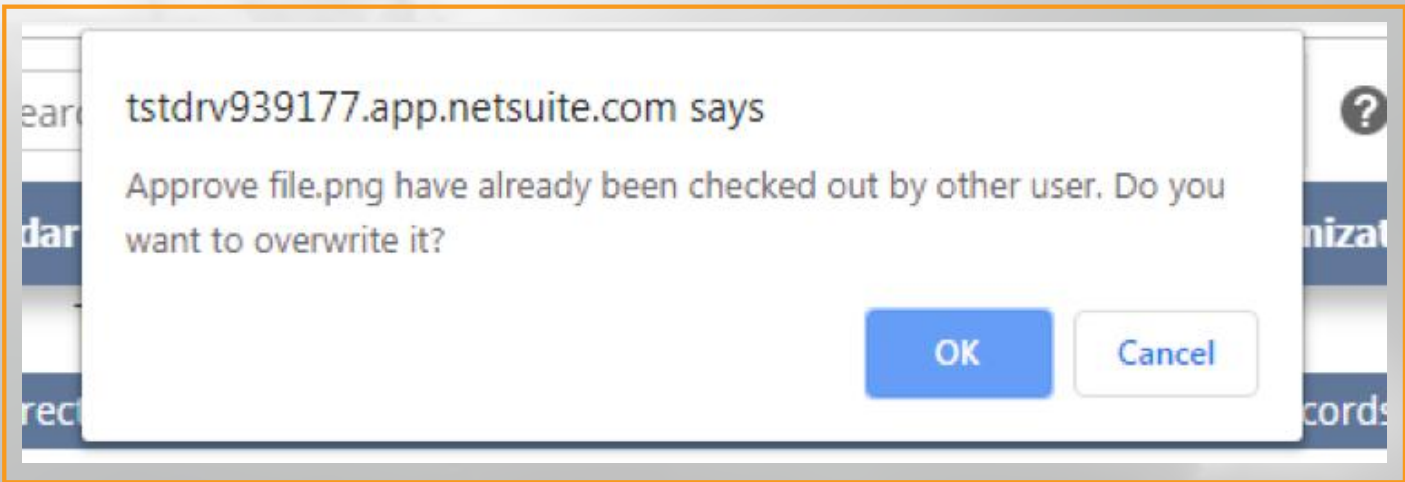
- A pop-up alerts you before the file download begins



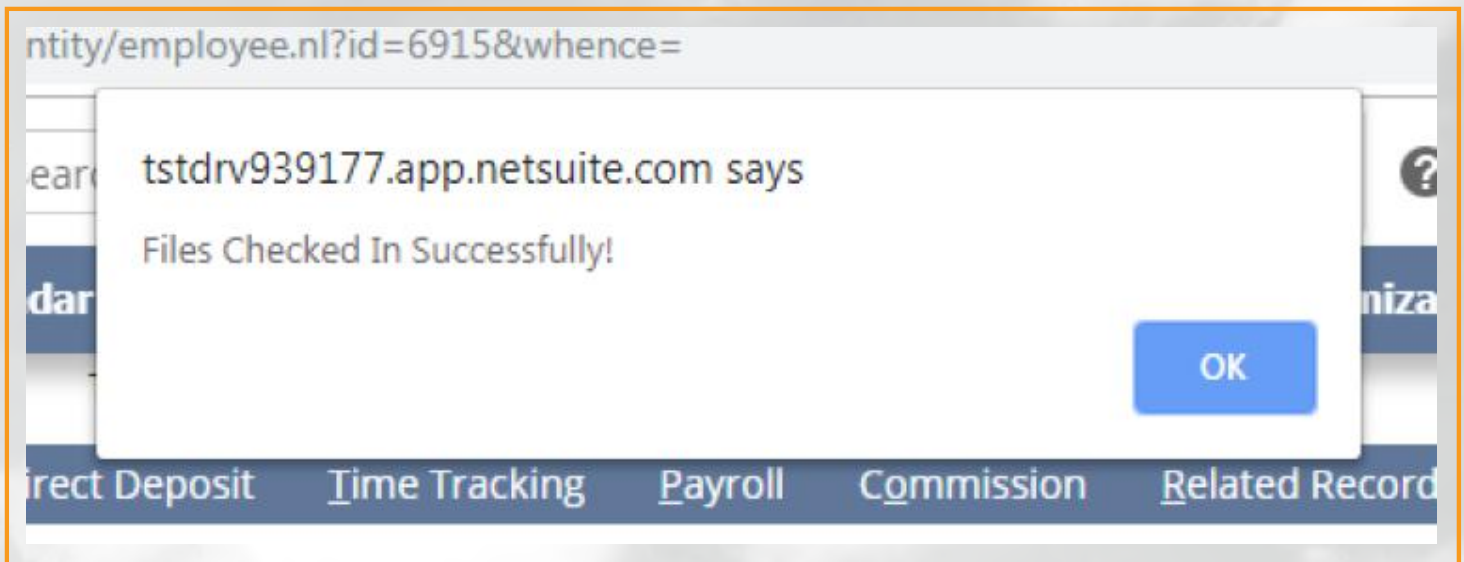
- Once the file has been checked out, an **X** appears beside the file name in the display list, along with the name of the person who checked it out



- A warning message alerts other users trying to upload the same file



- Users can either choose to proceed by clicking the **OK** button, or cancel the checkout by clicking the **Cancel** button
- If the user clicks **Ok**, a pop up appears, the file is uploaded and the **X** beside the file name disappears



- If the original owner tries to re-upload the file, there will be no warning pop-up. The file will upload, removing the **X** and the name of the person checking out the file from the checkout column

SKYDOC APPROVAL PROCESS

SkyDoc Approval Process is used to approve or reject any files uploaded into Employee/Sales Order/Purchase Order/Expense Report records.

Based on if the file approver has access to NetSuite or not, there are two types of approval processes available in SkyDoc. They are:

- NetSuite approval process
- External approval process

NetSuite approval process:

This approval process is used to approve or reject the files within Netsuite. Here the file approver has a NetSuite login.

External approval process:

If the approver does not have access to NetSuite, SkyDoc Portal is used to approve/reject files. Files are uploaded to the SkyDoc tab in Netsuite and then sent to external users for approval. In order for external users to access the SkyDoc Portal, they must be assigned as author for every email sent in the approval process. For more information on SkyDoc Approval Process, please refer to the *SkyDoc Approval Process* document.

DASHBOARD ANALYTICS

SkyDoc allows for tracking of KPI's such as number of files, number of SkyDoc folders and storage used for SkyDoc, along with comparisons like last month vs this month, last year vs this year, etc. This information can be found on the NetSuite Dashboard.

Key Performance Indicators

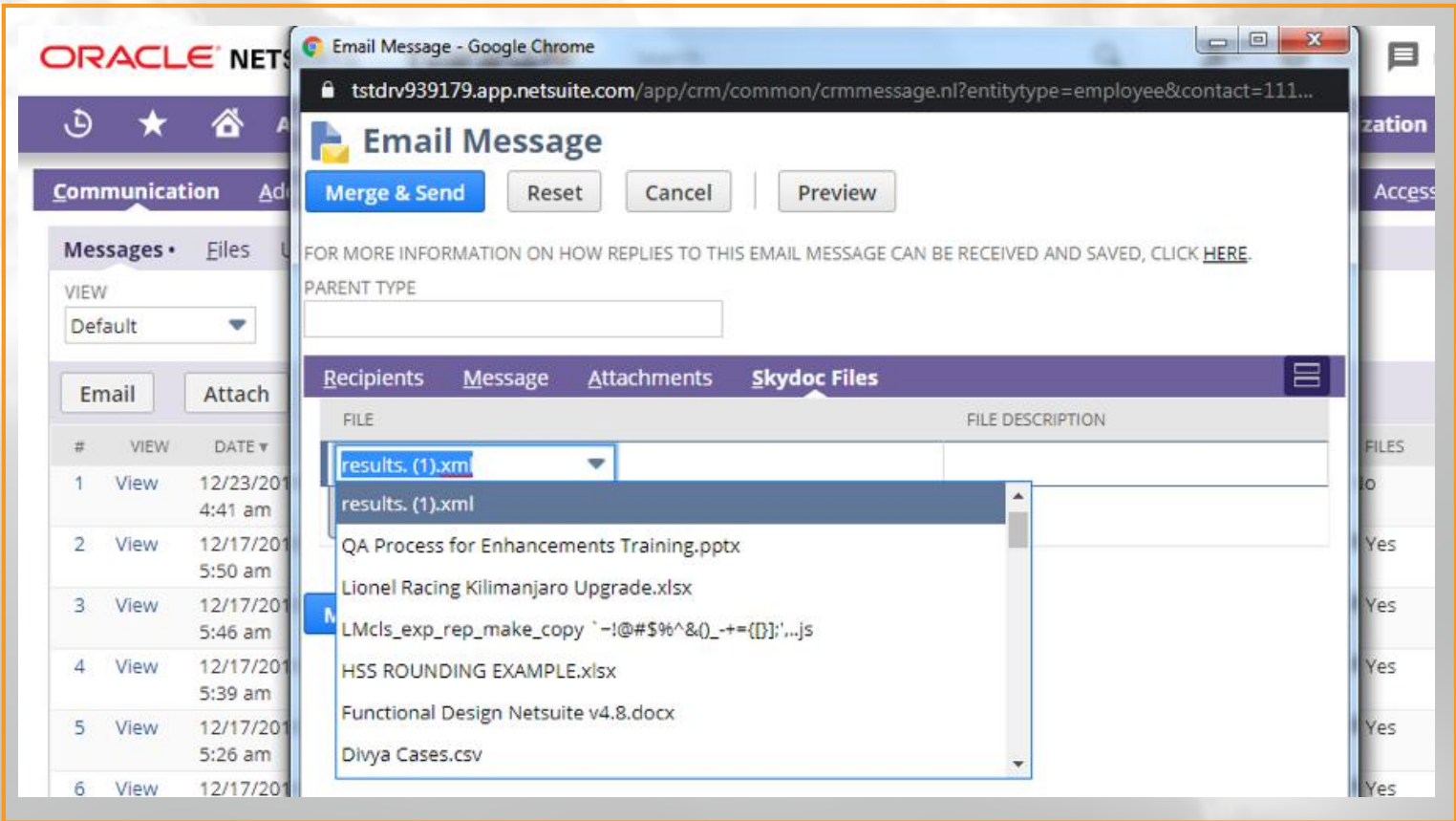
INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
SkyDoc Files	This Month vs. Last Month	243	278	↓ 12.6%
SkyDoc Folders	This Month vs. Last Month	4	0	↑ N/A
Storage Used For SkyDoc Files(MB)	This Month vs. Last Month	225.806	27.52	↑ 720.5%

Shortcuts

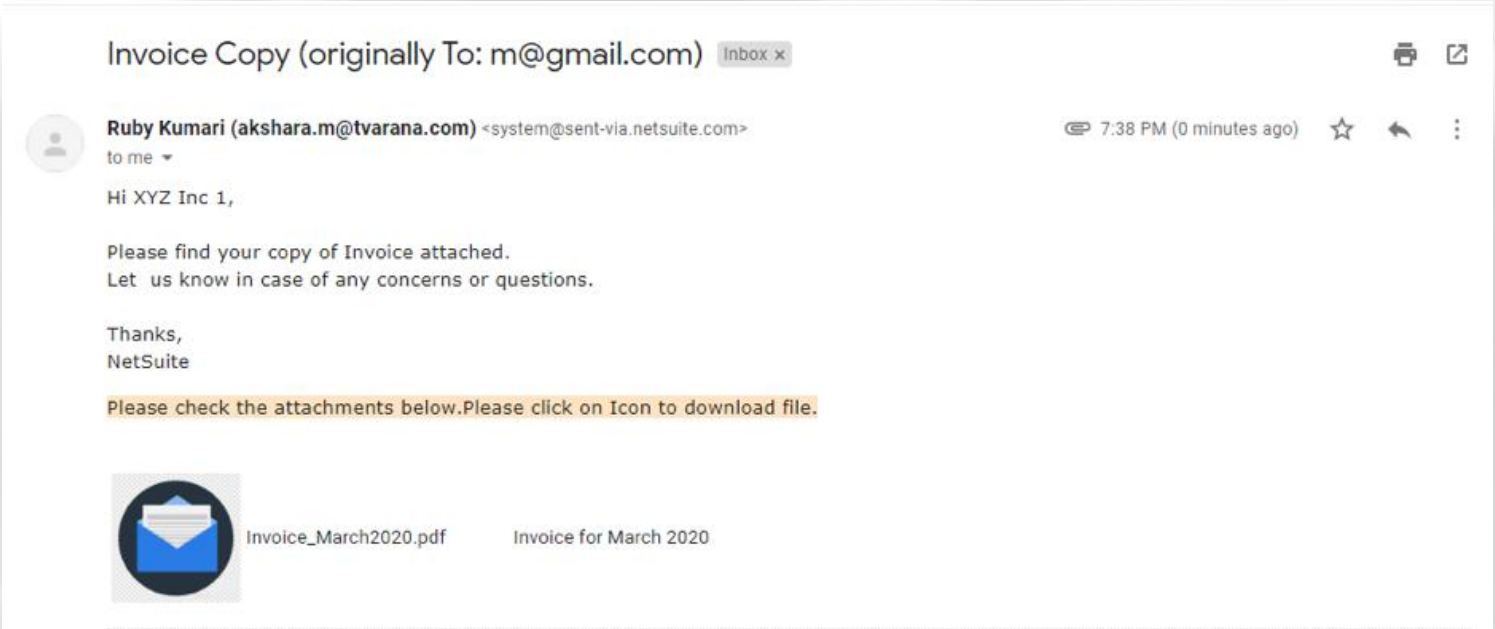
ATTACHING SKYDOC FILES WHILE SENDING EMAILS

NetSuite's native email functionality keeps all communication within reach. SkyDoc bypasses the need to download a file to a computer before attaching it to an email, and attaches the file to the email as a link instead. This makes sending files of any size possible.

- Click on the **Email** button in the **Communication** subtab
- Enter email details like recipient, subject, message, etc.
- Attach the file in the **SkyDoc Files** subtab



- Click on **Merge & Send**
- Email will be sent to the recipient



- The file can be downloaded by clicking on the icon

SUBSIDIARY BASED FOLDER

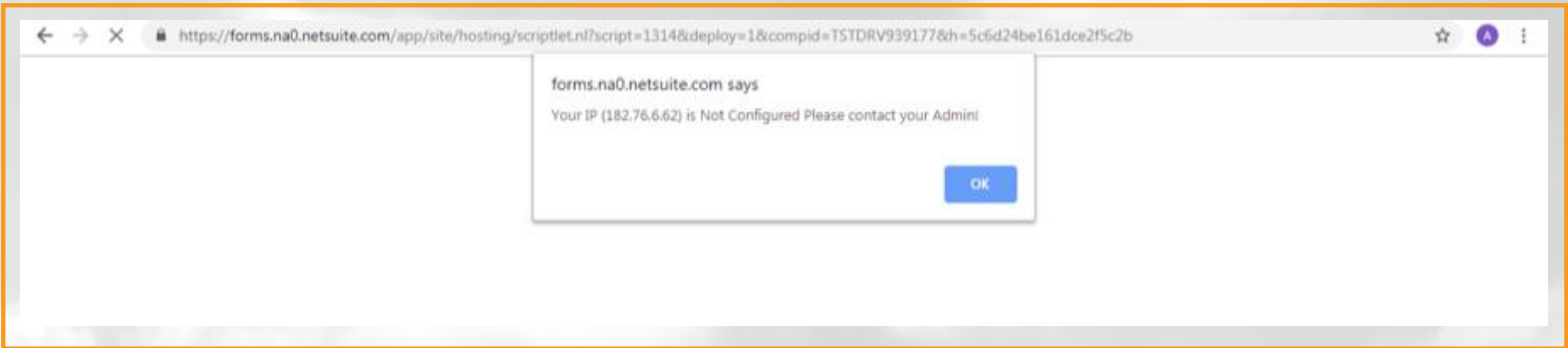
- SkyDoc folders can be made default based on the subsidiary of the record
- For subsidiary based folders, navigate to **Documents > SkyDoc Folders > SkyDoc Folders List**
- Open any folder and select a subsidiary in the **Subsidiary** field (This feature is available only in Oneworld accounts)
- The folder record in which the subsidiary is selected will be the default folder for all the records in that subsidiary

A screenshot of the 'SkyDoc Folders' configuration form. The form has a title bar with 'List', 'Search', 'Customise', and 'More' options. Below the title bar are 'Save', 'Cancel', and 'Reset' buttons. The form contains several fields: 'NAME' (with a red asterisk) containing 'SkyDoc Folder', an 'INACTIVE' checkbox, 'SUBFOLDER OF' dropdown, 'ACCESS TO FOLDER' text area, 'ACCESS TO ALL EMPLOYEES' checkbox (checked), 'SAVED SEARCH EMPLOYEE ACCESS' dropdown, 'SUBSIDIARY' dropdown (highlighted with a red box), and a 'PUBLIC' checkbox. The 'SUBSIDIARY' dropdown is currently empty.

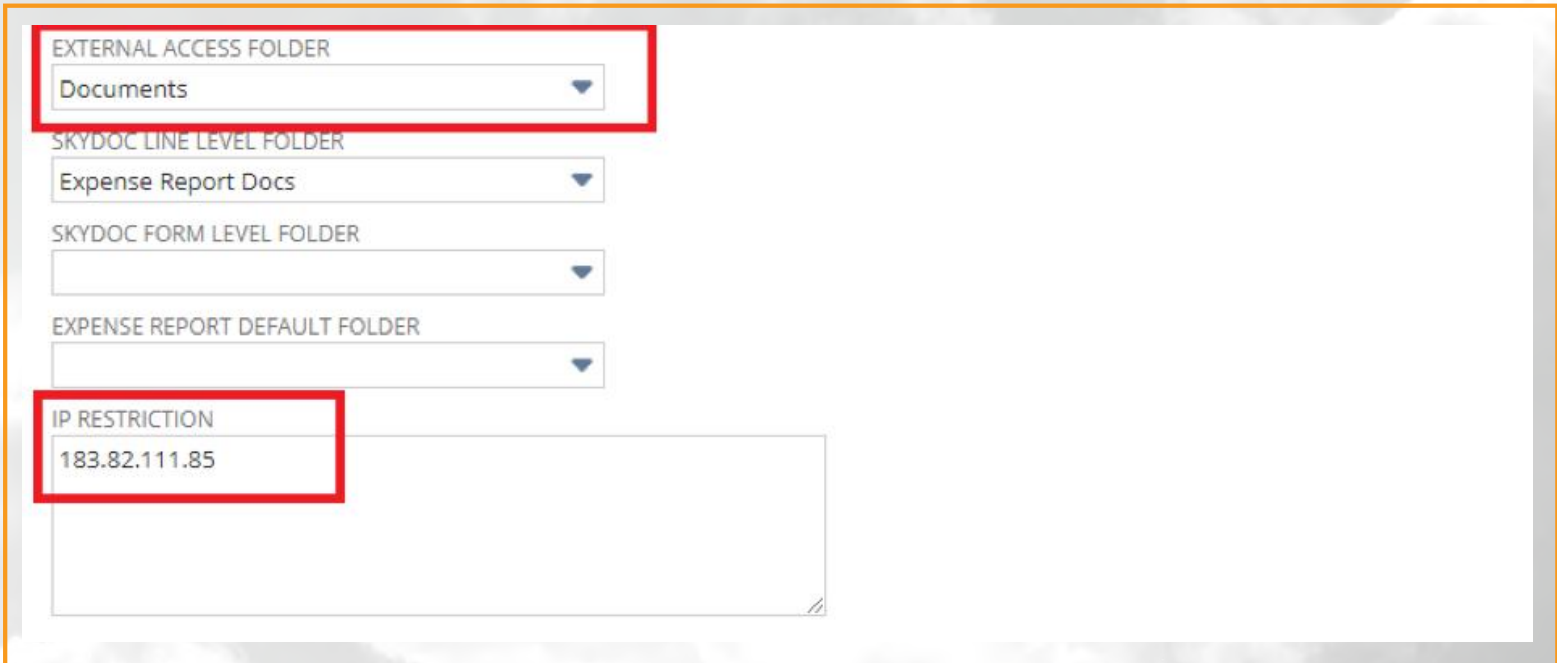


SKYDOC IP RESTRICTION

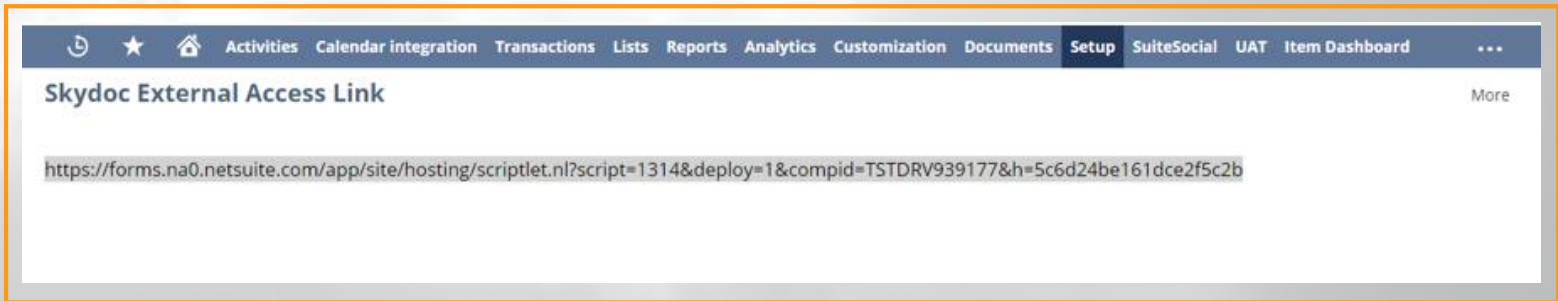
- External users need to be sent an access link in order for them to upload files into SkyDoc
- They can use this link only if their IP address is registered in the **IP restriction** field in the **SkyDoc roles** page
- If not, then the user may get an **Access denied** error message



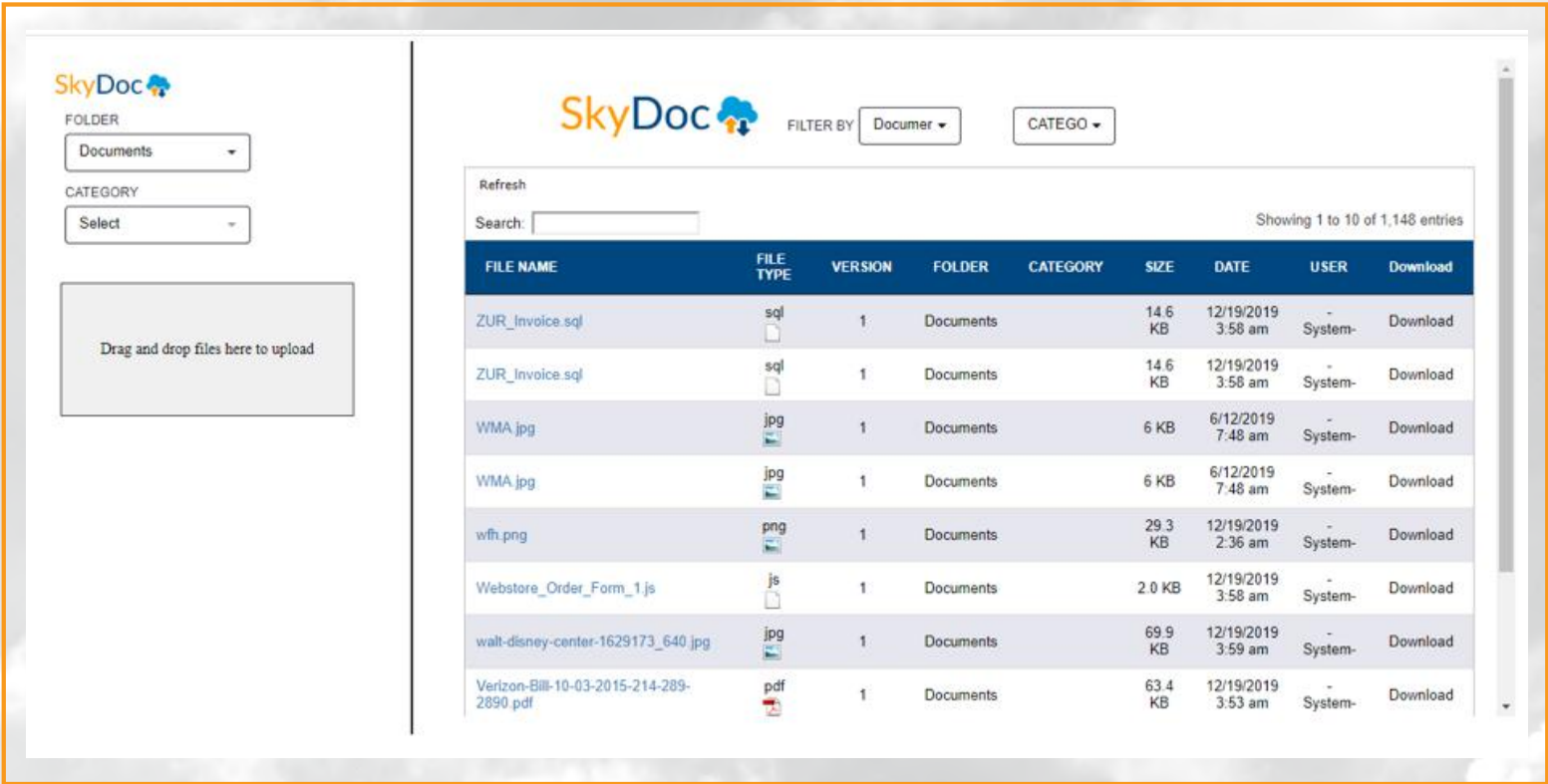
- Select a default folder for the External access in **Setup > SkyDoc > SkyDoc Roles > External Access Folder**



- Navigate to **Setup > SkyDoc > SkyDoc Portal Link**

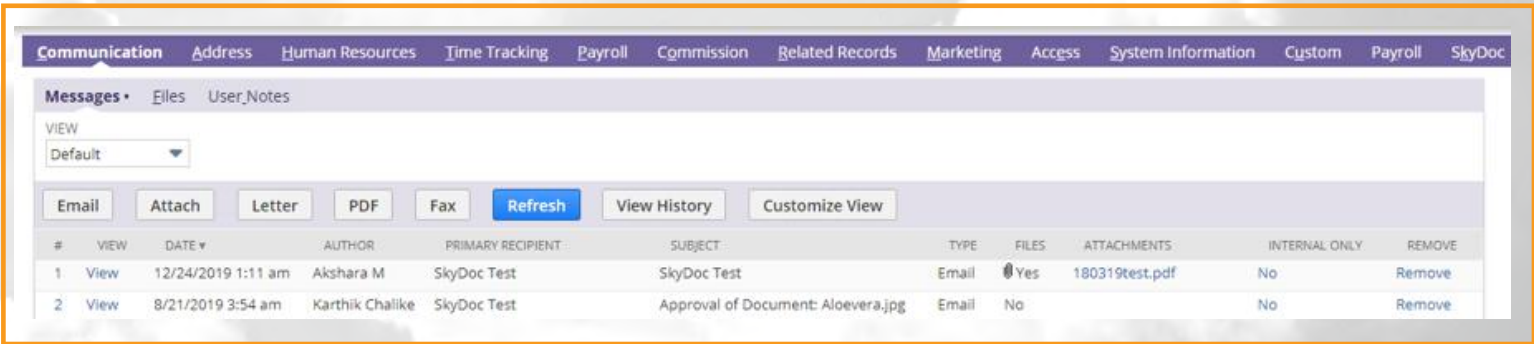


- When the above url is copied and pasted in a browser tab and the IP address of the user has been registered, then the user will be able to access the portal and upload files into it

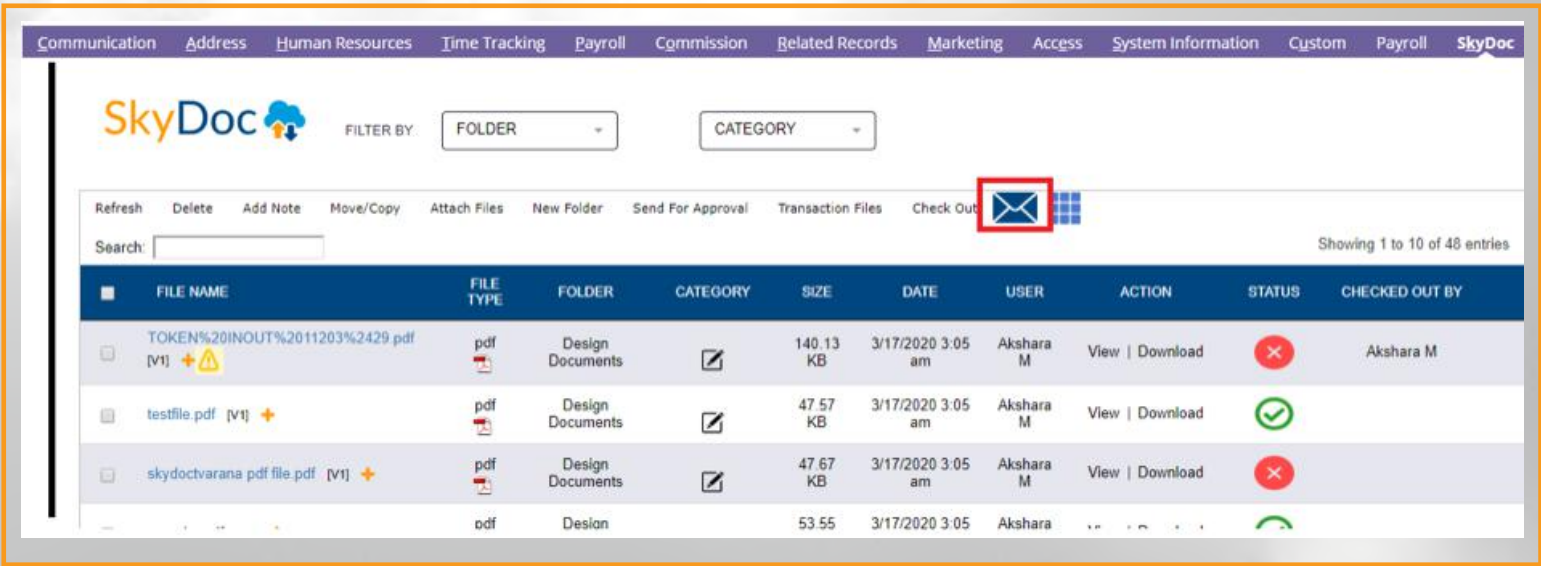


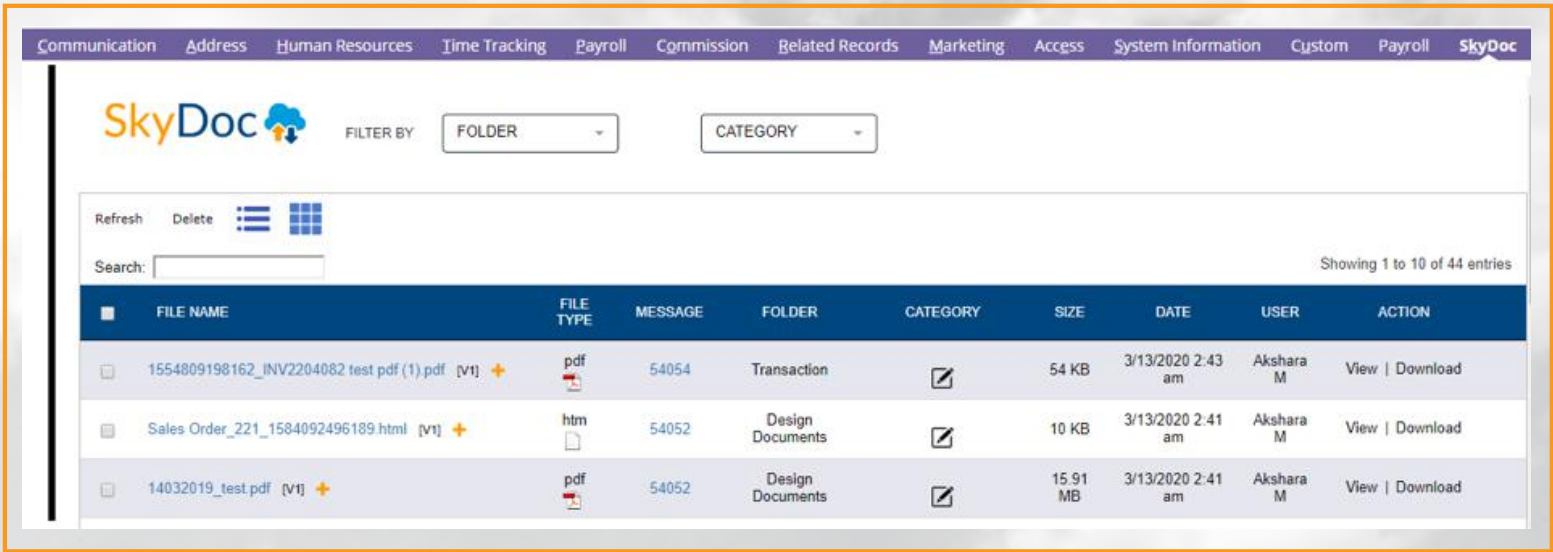
TRANSFERRING MESSAGE ATTACHMENTS TO SKYDOC

When a file attached to an email message sent from a record, then automatically uploaded to SkyDoc while being deleted from the Netsuite.



Clicking on the message icon in the SkyDoc Display List displays files attached to email messages in that record

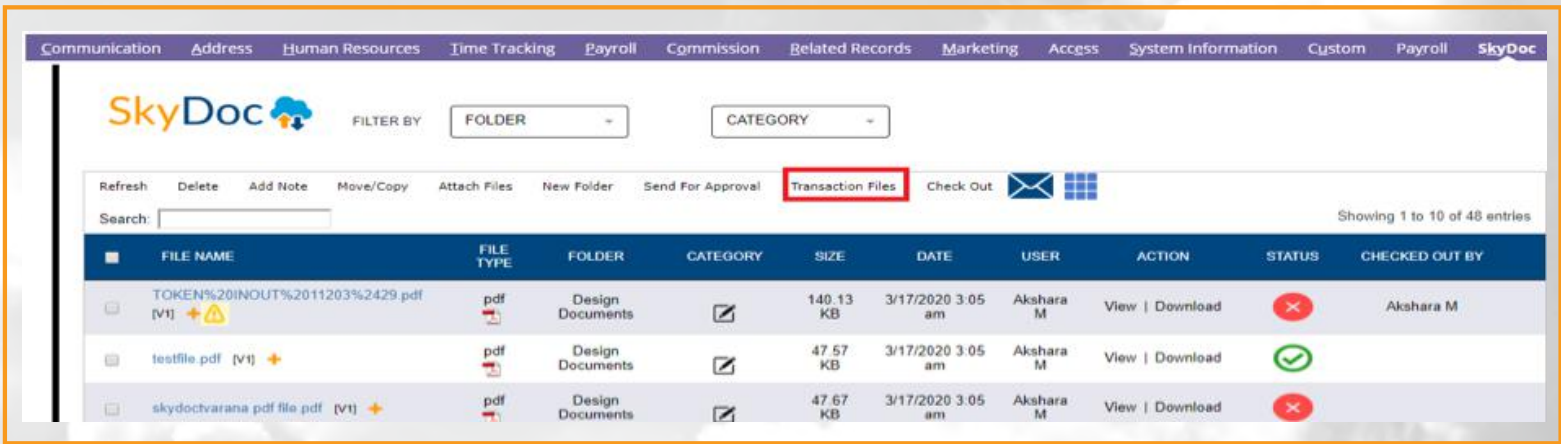




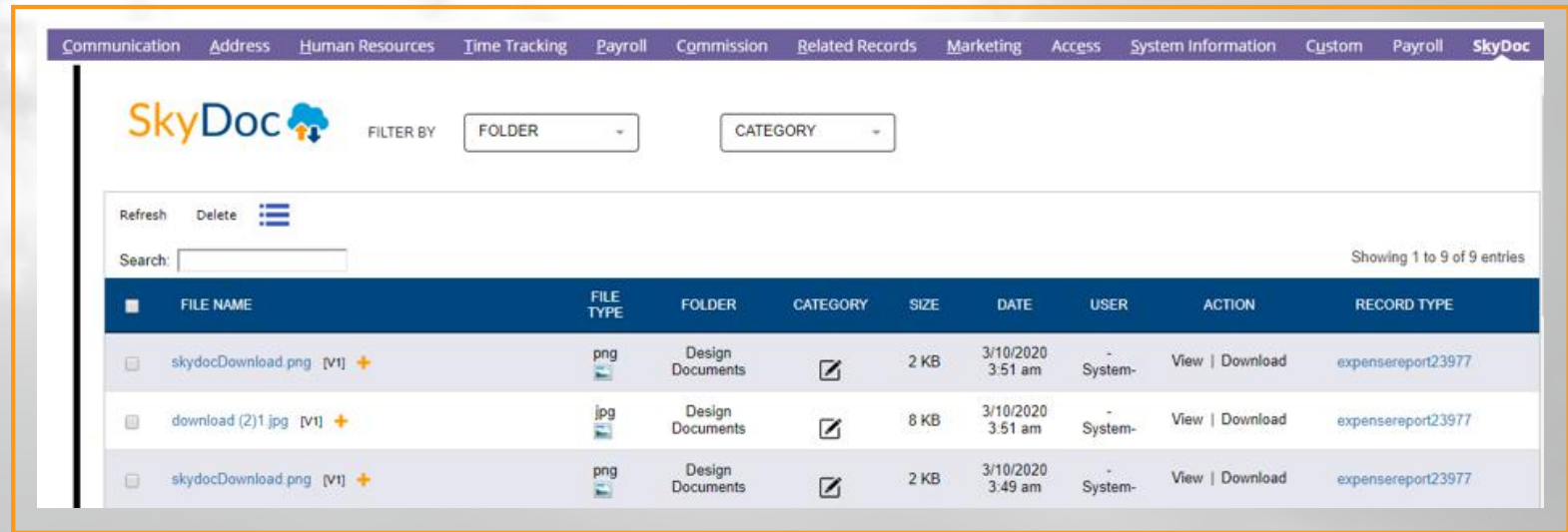
VIEWING SKYDOC FILES FROM ENTITY RECORDS

Transaction Files on a client record show all files pertaining to that particular client. All documents related to a client that are attached to transactions, such as sales orders or invoices, can be found in one place.

- To access this feature, open any entity record and click on the **Transaction files** button



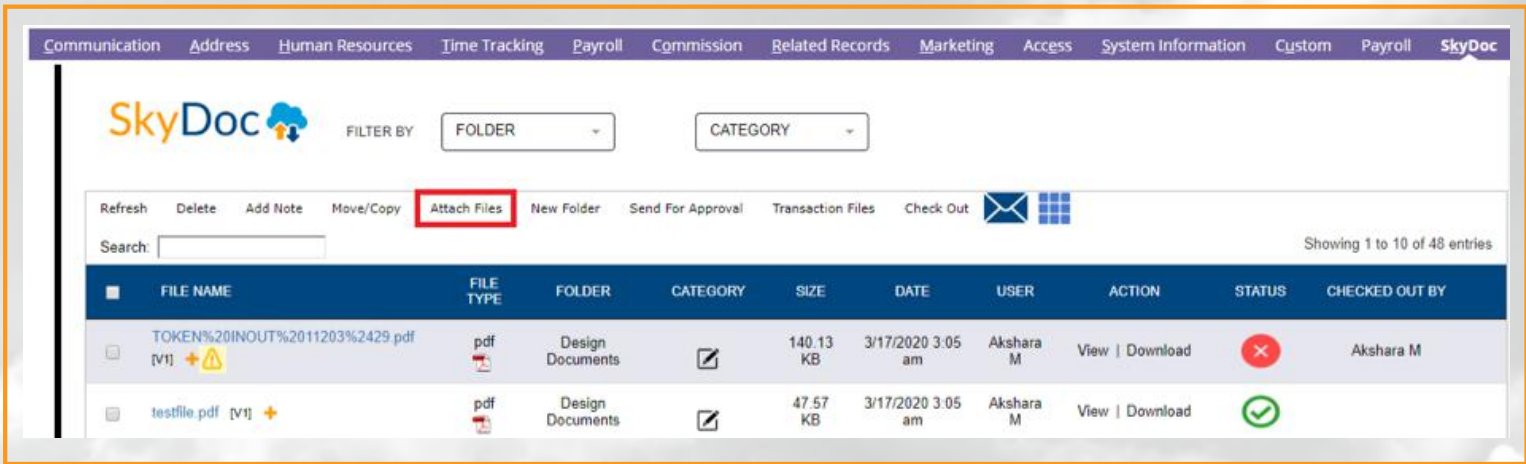
- SkyDoc files attached to transactions that are related to the entity are shown in the SkyDoc display list



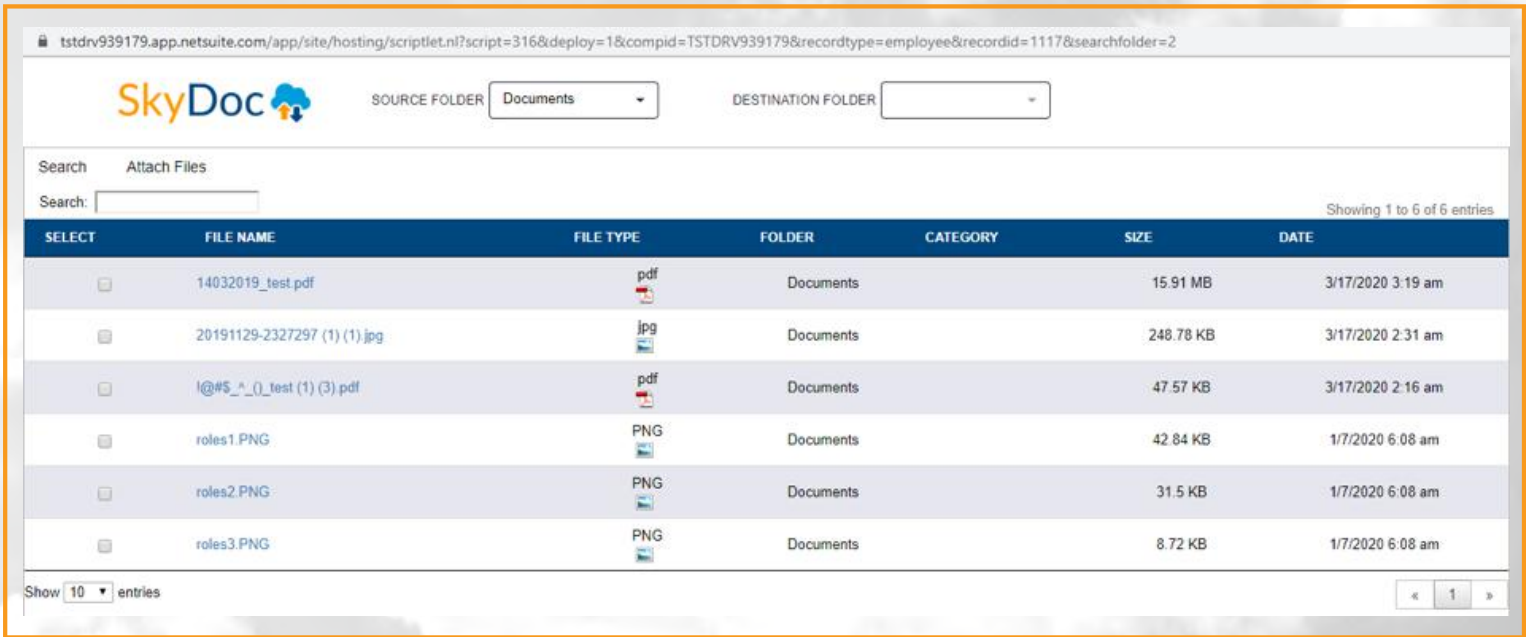
- Related record link is displayed in the **Record Type** column

ATTACHING EXTERNALLY UPLOADED FILES TO NETSUITE RECORDS

Files uploaded through SkyDoc Portal or SkyDoc folders are not get attached to any record. The **Attach files** feature can be used to attach files to a record.



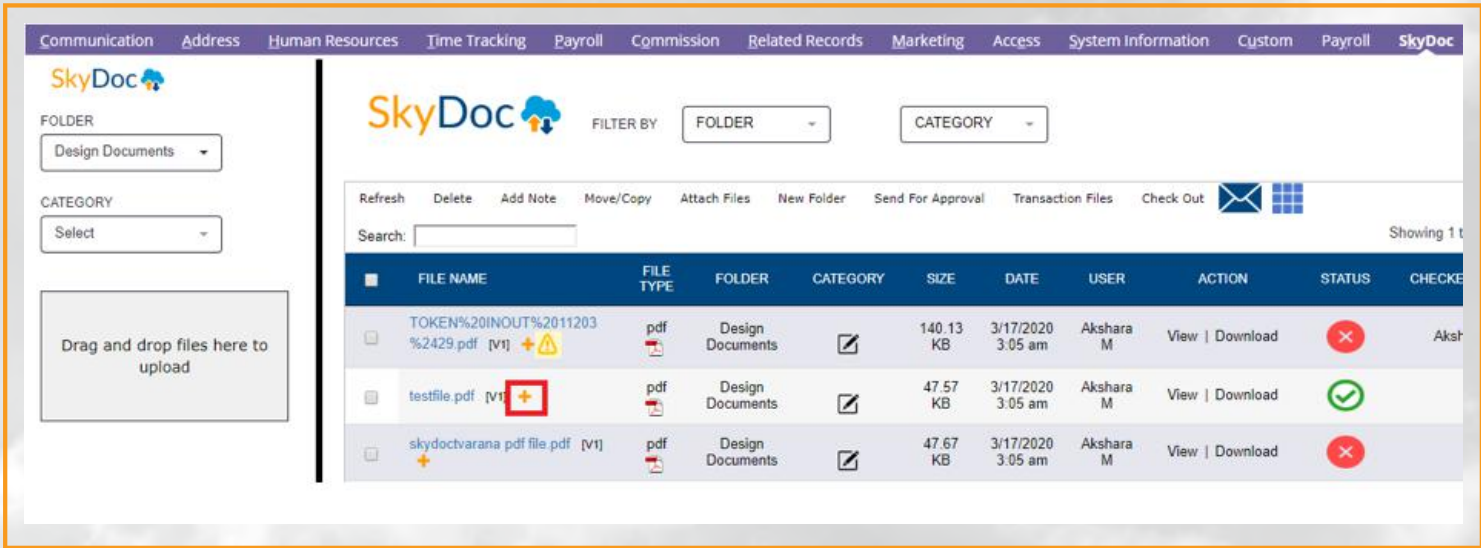
- Files attached externally or files uploaded in SkyDoc Folders can be seen in the results page



- Select a file and click on **Attach Files**
- Select the destination folder from the **Destination Folder**

ADDING FILE DESCRIPTIONS

Files can be given a description by clicking the **+** symbol next to the file name.

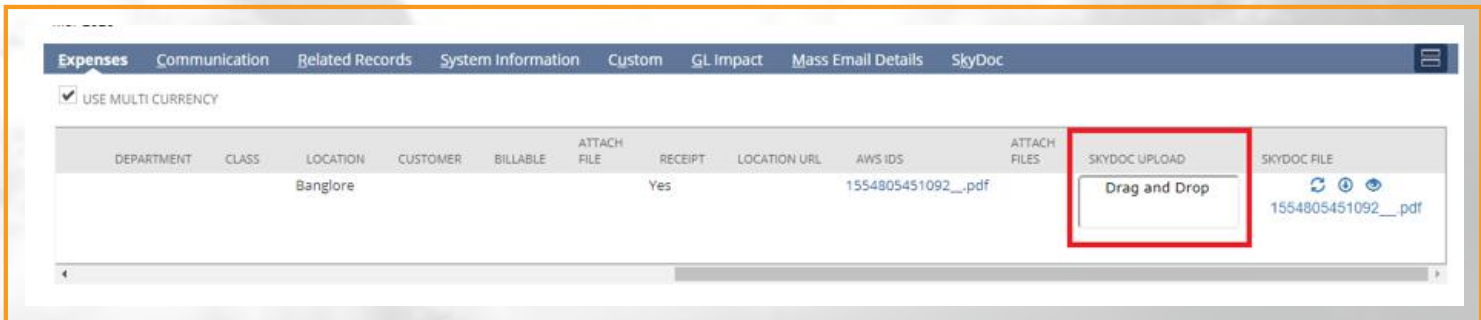


UPLOADING FILES TO EXPENSE REPORTS

The **Line Level Drag and Drop** feature is used to upload files to SkyDoc from expense report lines or transfer files attached in the **Attach files** field to SkyDoc.

Line Level Drag and Drop

- In expense reports a SkyDoc Drag and Drop field is available, which is used to upload files to expense report lines (This drag and drop field is visible only in **view** mode but not in **create** and **edit** mode)



- Files uploaded in the **SkyDoc Upload** field can be seen in the **SkyDoc File** field by clicking the refresh icon. In the SkyDoc File field, there are options to view, refresh and download files

Expenses

Related Records

System Information

EET

Clear All Lines

REF NO.	RECEIPT DATE	CATEGORY	CLIENT	PROJECT	EXPENSE NARRATIVE	MILEAGE (IF APPLICABLE)	ATTACH FILE	AMOUNT (TRANSACTION CURRENCY)	CURRENT
1	2/12/2019	Awards tickets & entries	<Type then tab>	<Type then tab>			Chrysanthemum.jpg		

Add

Cancel

Copy Previous

Insert

Remove

Expenses

Communication

Related Records

System Information

EET

GL Impact

GL Matching

CURRENCY	EXCHANGE RATE	AMOUNT (LOCAL CURRENCY)	P11D	CTD	AMOUNT ENTERED	AMOUNT IN CURRENCY - FOR MAKE A COPY	EXPENSE SKYDOC	MCS CLIENT	MCS PROJECT	LOCATION URL	AWS IDS	SKYDOC FILE
Australian Dollar	0.5244	100.00			100						Chrysanthemum.jpg	Chrysanthemum.jpg

SKYDOC FILES

SECURITY

This enhancement provides an additional layer of security to SkyDoc files uploaded in the expense report by granting access only to the file owner(user who uploaded the file) and the Expense Approver.

Others trying to access the file will see an error message **Insufficient Permissions. Current User Doesn't have Permission to view this File.It should be accessed from the Record where this file is attached.**

A default folder is used to store files uploaded into the expense reports. This folder is default only for expense reports and this should not be the default folder for other record types.

To select the default folder for expense reports, follow the navigate **Setup > SkyDoc > SkyDoc Roles > Expense Report Default Folder** and select any folder

SKYDOC LINE LEVEL FOLDER

Expense Report Receipts

SKYDOC FORM LEVEL FOLDER

Demo Docs

EXPENSE REPORT DEFAULT FOLDER

Expense Report Receipts

IP RESTRICTION

The above enhancement works only if files are uploaded into the folder selected on the **SkyDoc Roles** page

DEFINING ACTIONS BASED ON ROLES

Please navigate to **Setup > SkyDoc > SkyDoc Roles**

This page is used to set role-based permissions for various actions like admin, upload, view, delete, attach files, move/copy, access 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!

