

Handling Documents

The Main Menu contains a list of all the documents you have created or that have been shared with you by others as well as options for adding new documents and handling the documents already saved.

Displaying Documents

On the left side of the Main Menu you will find a list of folders that have been created by you or others for structuring purposes (if no folders have been created yet, the list will be empty).

Clicking on one of the folders will display the documents contained in it on the right side of the Main Menu. In Figure 1.2 you can see that the folder "P2P" has been selected from the folder list and its documents are displayed on the right.

Search for Documents

You can use the search field in the top on the right side to search for documents. Typing in the first letters of your search, will already remove the documents that do not match your search.

Sharing, editing, deleting and downloading Documents






Next to each document displayed on the right side of the Main Menu, you can see a list of different options available for interacting with it. Figure 1.3 shows all the different options available for handling a document. Please note that depending on the [user role](#) assigned to you, the list of options may vary. A user with the role of a "Viewer" will for example only be able to see the first two and the last icon.

To learn about the different user roles, please refer to [User Roles](#)..



Figure 1.3: Document Handling Options

The following list describes the functionalities of each option (from left to right):

- **Share Document with Users**  : Use this option to share your analysis with other users. More details will be given in [Sharing Analyses](#).
- **Share Document with Groups**  : Use this option to share your analysis with groups of users. More details will be given in [this chapter](#).
- **Edit Document Settings**  : Edit the settings of the document that have been defined upon creation. The document settings will be explained in [Creating an Analysis](#).
- **Delete Document**  : Use this option to permanently delete this document. Please note: Deleting the document will permanently remove it for all users the document is shared with!
- **Download Document**  : Save the document to your desktop in a SAP Process Mining by Celonis-readable format.

Add Document

In the top right corner of the Main Menu you will find the button "Add Document" (if you have the necessary user rights). Click here to add a new document to your document list.

How to create a new document will be explained in [Creating an Analysis](#)..



Figure 1.4: Add a document