Documents Handbook

A governed document workspace — upload, classify, foldered filing, versioning, internal sharing and threaded comments, plus tokenised external exchange links and branded templates.

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Reference

The Documents module is the shared, governed store for every file the business keeps. It captures uploads against a category and type, files them in nestable folders, classifies and retains them, tracks versions, and lets colleagues share, comment on and — where you allow it — send documents out to people beyond the organisation through a passcode-protected exchange link. Branded templates back the letterheaded documents that Proposals and Contracts render. Every action is scoped to a level in your organisation hierarchy, permission-checked on the request, and written to the platform audit trail.

This guide is a reference for what the module does and how the pieces fit together. It describes IXL CORE **version 1.0**.

Overview

At a glance, Documents covers these connected areas:

- **Documents & files** — upload a file with a title, description, category and type, linked to a business record.
- **Folders** — nestable, organisation-scoped folders that documents can be filed into.
- **Classification & retention** — a security classification and a retention policy, review date and hold status on every document.
- **Versioning** — upload a new version that supersedes the previous one, keeping the version chain intact.
- **Internal sharing** — grant a colleague or role a view, comment, edit or manage level on a single document.
- **Comments** — threaded comments and annotations on a document.
- **External exchange** — tokenised public links so people outside the organisation can view, download or upload a response.
- **Templates** — named, branded document templates per type, with a default per type.

Every document is scoped to a level in your organisation hierarchy (organisation, entity, branch,

department or position), and every action is governed by permissions (see Access & permissions).

Documents & files

A **document** wraps an uploaded file. When you upload, you supply a title (up to 160 characters), an optional description, the **category** and **type** it belongs to, the organisation scope it lives at, and the business record it is **linked** to — a document always references a linked resource, so it stays attached to the account, job, employee or other record it belongs with. The file itself is stored privately: it is never served from a public URL, and every download is permission-checked and audited individually. The type you pick must belong to the category you pick, and both must be active.

Each document records who uploaded it, who owns it, when it was created and its status — **active** or **archived**. You can update a document's metadata, archive it and later restore it. The main workspace listing shows the whole governed corpus for the organisation and can be filtered by folder, classification, retention status, type or linked record, and searched by title, description, classification and policy code.

Typical steps

1. Go to the **Documents** workspace and upload a file, giving it a title, category, type and the record it links to.
2. File it into a folder and set its classification if it differs from the default.
3. Later, **archive** it when it is superseded, or **restore** it if needed.

Folders

Folders organise documents into a nestable tree scoped to the organisation. A folder has a name, an optional description, a parent (or none, for a root folder) and a **default classification** that new documents can inherit. Folders track their depth and full path, so the tree stays consistent when a folder is moved: re-parenting a folder re-homes its entire sub-tree in one operation, and the system refuses to move a folder into itself or one of its own descendants. A folder that still contains sub-folders cannot be deleted until they are cleared; documents in a deleted folder fall back to the root rather than being lost. Moving a single document between folders is a separate action and leaves its business-record link untouched — a document can be both filed in a folder and linked to a record.

Classification & retention

Every document carries a **classification** — **public**, **internal**, **confidential** or **restricted** — defaulting to internal. Alongside it sits a **retention status**: **active**, **due for review**, **expired** or **retained** (a legal or records hold). You can classify a document to set its classification, an optional retention policy code, a review date and a retain-until date. A document placed on a **retained** hold is treated as immutable: it cannot be archived out of its active lifecycle, and it cannot be superseded by a new version, so a finalised or signed document on hold stays byte-for-byte intact.

Versioning

To replace a document's file while keeping its history, upload a **new version**. This creates a new document record that supersedes the prior one — the previous version is archived, and the new record links back through the version chain, incrementing the version number. You can optionally give the new version its own title and description; otherwise it inherits them. Documents on a retention hold cannot be re-versioned.

Internal sharing

By default a document is visible to those within its organisation scope. **Internal sharing** grants access additively on top of that scope, without ever crossing organisation isolation. You share a document with a **user** or a **role** at one of four levels — **view**, **comment**, **edit** or **manage** — and the grant surfaces the document to that person even if they are not otherwise in its scope. A people-picker lists the organisation members you may share with. Re-sharing an existing grantee changes their level rather than creating a duplicate, and every grant, level change and revocation is audited.

Typical steps

1. Open a document and choose **Share**.
2. Pick a colleague or a role and set their level — view, comment, edit or manage.
3. Revoke the share later if the access is no longer needed.

Comments

Documents support **threaded comments**. Anyone who can view a document can read its comments; commenting requires at least comment-level access. A comment has a body and can be a reply to another comment on the same document. Authors may edit or delete their own comments, and anyone with manage-level access can moderate — remove — a comment.

External exchange

The **Document Exchange** lets you send a document to someone outside the organisation through a **tokenised link** — no account needed on their side. When you create a link you choose its **permission** — **view**, **download** or **upload a response** — and optionally set a recipient email, an expiry, a passcode and a message. You can also route the link through a **publish approval** by naming approvers, so the link only becomes reachable after sign-off.

The recipient opens the link on a public portal. The unguessable token is the sole credential: a wrong, expired, revoked or not-yet-published token returns a clean "not found" that never reveals which. When a passcode is set, the portal reveals nothing about the document or recipient until the correct passcode is supplied, and repeated wrong attempts are rate-limited. Depending on the permission, the recipient can download the shared file or upload a response document, which is constrained to a safe allowlist of file types and a size cap. External sharing is the one metered corner of the module: an organisation has a cap on how many links can be active at once, and creating another is refused until an existing link is

revoked.

Templates

Document templates are named, branded templates for the letterheaded documents the platform produces. Each template has a **type** — **proposal**, **contract** or **letter** — a name, an optional letterhead, titled sections and terms. One template per type is the **default**; setting a new default clears the previous one. Templates can be previewed as a PDF (rendered with sample data and any merge tokens), edited and archived. They are a shared foundation consumed by Proposals, Contracts and any other branded document.

Access & permissions {#access-and-permissions}

Every Documents action maps to a specific capability — for example `documents.view`, `documents.upload`, `documents.archive`, `documents.workspace.view`, `documents.workspace.manage`, `documents.folders.manage`, `documents.sharing.manage`, `documents.exchange.manage`, `documents.templates.view` and `documents.templates.manage` are each separate permissions. Capabilities are grouped into roles and enforced on every request, not merely hidden in the interface. Documents also respect a **data-scope level** (organisation, entity, branch, department or position): you see and act on documents within your scope, and an internal share can additively extend that access without crossing organisation boundaries. Classifying, archiving, commenting and managing shares can each be authorised either by the relevant capability in scope or by a sufficiently high internal share level on the document itself.

How Documents connects

Documents is a shared platform foundation, not an island:

- **Templates** back the branded proposals, contracts and letters rendered elsewhere, and generated PDFs live in this document store.
- **Any business record** — an account, job, employee and more — can have documents linked to it, so files stay attached to the record they belong with.
- **The audit trail** records every upload, download, classification, share, comment and exchange event, so the document's history is always accounted for.
- **Publish approvals** route an external link through the platform approval flow before it becomes reachable.

That connection is the point: files are captured once, governed consistently, and reused wherever the business needs them.

How-to guides

Upload and manage a document

Upload a file into the governed document store, keep its metadata current, classify and retain it, and file it into a folder.

Bring a file into the Documents workspace, describe it, classify it and file it so it stays governed and findable.

Before you start

- Choose the company you are working in and the **Scope level** the document should live at — organisation, entity, branch, department or position. Deeper scopes require the parent to be set (a branch scope needs its entity, and so on).
- Have the **category** and **type** ready. The type you choose must belong to the category you choose, and both must be active.
- Know the record the document links to — every upload references a linked resource (for example an account, contact, lead or employee) by its type and id.
- Prepare the file itself. Uploads are limited to **10 MB** and to a safe allowlist: PDF, DOC, DOCX, XLS, XLSX, PPT, PPTX, TXT, CSV, PNG, JPG, JPEG, GIF, WEBP and ZIP.

Steps

1. Open the **Documents** workspace and choose to upload a document.
2. Enter a **Title** (required, up to 160 characters) and an optional **Description** (up to 1,000 characters).
3. Pick the **Category** and **Type** (both required). Choose the **Scope level** and any parent scope fields it needs.
4. Set the **Linked resource** — its type and id (both required).
5. Optionally choose a **Folder** to file it into, and set a **Classification** (public, internal, confidential or restricted — it defaults to internal).
6. Optionally set a **Retention policy code**, a **Review date** and a **Retain-until date**.
7. Attach the **File** and save.

[Screenshot: Upload document dialog with title, category, type, scope and file fields]

To edit later, open the document and update its **Title**, **Description**, **Category**, **Type** and **Status** (active or archived). Scope, linked resource and the file cannot be changed on an update — to replace the file, upload a new version instead. To reclassify, use the classify action to set the **Classification**, **Retention status** (only active or a retained hold can be set by hand), **Retention**

policy code, **Review date** and **Retain-until date**. To refile, move the document to another folder or to the root.

[Screenshot: Document detail with edit, classify and move actions]

Result

The document is stored privately in the governed corpus, filed and classified. Every download is permission-checked and audited, and the record stays attached to its linked resource.

Related

- Documents reference
- Organise documents into folders
- Share a document with your team

Organise documents into folders

Build a nestable folder tree scoped to your organisation, set a default classification, and re-parent folders safely.

Folders give the document store a nestable tree so files are easy to find and inherit a sensible default classification.

Before you start

- Choose the company you are working in — folders are scoped to the organisation.
- Decide where the folder sits: at the root, or under an existing parent folder.
- Decide the **default classification** new documents in the folder should inherit, if any.

Steps

1. Open the **Documents** workspace and choose to create a folder.
2. Enter a **Name** (required, up to 160 characters).
3. Optionally add a **Description** (up to 1,000 characters).
4. Optionally choose a **Parent folder** — leave it empty for a root folder.
5. Optionally set a **Default classification** (public, internal, confidential or restricted) that new documents can inherit.
6. Save the folder.

[Screenshot: New folder dialog with name, parent and default classification]

To change a folder later, edit any of its fields — **Name**, **Description**, **Parent folder** or **Default classification**. Every field is optional on an update, so you can change just one. Re-parenting a folder re-homes its entire sub-tree in one operation; the system refuses to move a folder into itself or into one of its own descendants, keeping the tree consistent.

[Screenshot: Edit folder dialog changing the parent to re-home a sub-tree]

A folder that still contains sub-folders cannot be deleted until they are cleared. If you delete a folder that holds documents, those documents fall back to the root rather than being lost.

Result

Your documents are organised in a consistent, nestable tree. New documents filed into a folder can inherit its default classification, and the folder's depth and path stay correct even after a move.

Related

- Documents reference
- Upload and manage a document
- Share a document with your team

Share a document with your team

Grant a colleague or role view, comment, edit or manage access to a single document, and hold threaded conversations with comments.

Internal sharing widens a document's reach to a specific colleague or role, and comments let your team discuss it in place.

Before you start

- Open the document you want to share. Internal sharing grants access additively on top of the document's scope; it never crosses organisation boundaries.
- Decide whether you are sharing with a single **person** or with a **role**.
- Decide the level of access each recipient needs: view, comment, edit or manage.

Steps

Share the document

1. Open the document and choose **Share**.
2. Pick exactly one recipient — either a **User** or a **Role**. One of the two is required, and you may not set both.
3. Set the **Share level** (required): **view**, **comment**, **edit** or **manage**.
4. Save the share.

[Screenshot: Share dialog with a people-picker and a share-level selector]

Re-sharing an existing grantee changes their level rather than creating a duplicate. Revoke a share later when the access is no longer needed. Every grant, level change and revocation is audited.

Add a comment

1. Open the document and go to its comments. Anyone who can view the document can read comments; posting requires at least comment-level access.
2. Enter the **Body** (required, up to 4,000 characters).
3. To reply to an existing comment, post against its **Parent comment** so the thread stays connected.
4. Save the comment.

[Screenshot: Comment thread with a reply being composed]

Authors can edit or delete their own comments, and anyone with manage-level access can remove a

comment.

Result

The document is visible to the person or role you shared it with at exactly the level you set, and your team can discuss it through threaded comments — all recorded on the audit trail.

Related

- Documents reference
- Upload and manage a document
- Share externally with an exchange link

Share externally with an exchange link

Send a document to someone outside the organisation through a tokenised exchange link, gated by permission, expiry, passcode and optional publish approval.

The Document Exchange sends a document to someone beyond the organisation through a tokenised link — no account needed on their side.

Before you start

- Open the document you want to share out. The unguessable token in the link is the sole credential the recipient uses.
- Decide what the recipient may do: view only, download, or upload a response.
- Decide whether the link should expire, be gated by a passcode, and whether it must be approved before it goes live.

Steps

1. Open the document and choose to create an external exchange link.
2. Set the **Permission** (required): **view**, **download** or **upload a response**.
3. Optionally enter a **Recipient email** (up to 200 characters).
4. Optionally set an **Expiry** — a date or time in the future after which the link dies. A plain date is treated as end-of-day in the organisation timezone.
5. Optionally set a **Passcode** (between 4 and 64 characters) that the recipient must supply before the portal reveals anything.
6. Optionally add a **Message** (up to 1,000 characters).
7. To route the link through publish approval, name up to **five approvers** — each must hold a role in this organisation. The link only becomes reachable after sign-off.
8. Create the link.

[Screenshot: External share dialog with permission, expiry, passcode and approvers]

The recipient opens the link on a public portal. A wrong, expired, revoked or not-yet-published token returns a clean "not found". Where the permission allows, they can download the file or upload a response, which is constrained to the same safe file-type allowlist and size cap as internal uploads. An organisation has a cap on how many links can be active at once; creating another is refused until an existing link is revoked.

Result

An external recipient can reach exactly the document you shared, at exactly the permission you set, gated by any passcode, expiry and approval you configured — and every exchange event is audited.

Related

- Documents reference
- Share a document with your team
- Upload and manage a document

Create a branded document template

Build a named, branded template for proposals, contracts or letters — with a letterhead, titled sections and terms — and set the default per type.

Document templates are the branded, letterheaded foundation the platform uses to render proposals, contracts and letters.

Before you start

- Choose the company you are working in.
- Decide the template **type**: proposal, contract or letter.
- Have your branding to hand — an accent colour, and any header or footer text for the letterhead.
- Plan the sections your template needs and whether each should be AI-draftable.

Steps

1. Open the **Documents** templates area and choose to create a template.
2. Set the **Type** (required): **proposal**, **contract** or **letter**.
3. Enter a **Name** (required, up to 160 characters).
4. Optionally mark the template as the **Default** for its type. Setting a new default clears the previous one.
5.
6. Optionally configure the **Letterhead**:
   Add up to **30 sections**. For each section set a **Title** (required, up to 160 characters), and optionally a **Key** (up to 60 characters), a **Body** (up to 20,000 characters) and whether it is **AI-draftable**.
7. Optionally add **Terms** (up to 20,000 characters).
8. Save the template.

[Screenshot: Template editor with type, letterhead, sections and terms]

Templates can be previewed as a PDF rendered with sample data and any merge tokens, edited and archived.

Result

A named, branded template is available for its type. If you marked it default, it becomes the one used automatically, and it is ready to back the proposals, contracts and letters the platform renders.

Related

- Documents reference
- Upload and manage a document
- Share externally with an exchange link