

# User Guide: Library website

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## File Management

Select a folder to view files. Icons below each file perform the following functions




- Enlarged file view/Select MAGNIFYING Icon
- View file attributes/Select CLIPBOARD Icon
  - Edit attributes/Select PENCIL Icon at top middle of the file attribute page
- Download files/Select GLOBE ARROW Icon
- Email file as link/Select EMAIL Icon
  - Outlook will open with the file link in the outbound message
- Add files to Cart to download or email
  - Check the box in top left corner next to the file(s)/Select CART Icon
  - Select VIEW CART from top navigation bar
  - NOTE: All files added to the cart by you or other visitors are visible in cart
    - Download files from cart/Select files to be downloaded using the check box at left
      - File formats can be converted prior to download by selecting new format from pull down menu
      - File resolutions can be converted by selecting lower resolution from menu
    - Send files from cart/Select files to be emailed as links using the check box at left
      - For added security you can protect cart contents by entering a password that will be required by the recipient
      - Outlook will open with a link to the cart in the message box
      - Recipients will receive a link to the cart where they can see all files sent, convert file format and resolution, and select files for download
- Versions
  - Below the file name you will see the Version # for that file; if there are multiple versions, select the MULTIPLE FILE Icon to view all versions on one page or screen
- Watch List
  - Select the BINOCULAR icon to be notified by email when new versions of a file are uploaded or if its attributes have been updated. To remove yourself from the Watch List, click the icon.
- Link Files\*
  - To link a file so that is it accessible in folders other than the folder it was originally uploaded
    - Select the file to be linked by checking the top left corner next to the file

- Select LINK icon
  - Select the folder from the filing tree where the file is to be linked
  -
- NOTE:** By updating the original file, you will automatically update all linked files

### Upload files\*

- Drag and Drop files or folders with files and select UPLOAD
- or Browse local drives or servers, select files and select UPLOAD


#### Assign Files to Folders

- Select one or all files using the left side check box, then
- SELECT FOLDER from your list of Library folders and
- Click the Save icon in the left side of the top bar 



#### Assign Attributes to Files

- Fill out the attributes for each uploaded file on all attribute tabs
- Select CARRY OVER SELECTED ATTRIBUTES if attributes are shared by other files
- Select UPLOAD FILE to complete the process

### Delete files

- Check the box in the top left corner of a file/files to be deleted
- From the folder options in the top left bar select the FILE X  to delete the selected files
- You will be presented with a message asking confirming you want to delete the file/Select OK to delete


### View/Edit Attributes

- View attributes by selecting select the CLIPBOARD icon  under the file; attributes are displayed under one or more tabs
- Edit attributes from the attribute page by selecting the PENCIL icon 
  - Enter attributes in the fields on one or more tabs and select UPDATE VALUES

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## Folder Management

### Add folders\*


- Select the FOLDER + icon on the top of filing tree 
  - Enter folder name
  - Enter (optional) description for folder that is presented as a hover-over, so users can identify folder contents without opening the folder
  - Allow Uploading enables files to be uploaded to the folder and is the default feature of all folders
    - Override this feature if you want the folder to serve as a means to organize your filing tree without containing files

- Private is an option that makes the folder private to all users but yourself and other users with Library ADMIN rights
- View Mode refers to how file versions will be presented in the folder; default is Most Recent
- Select an Attribute Group from the pull down menu to add additional information to files in this folder
- Select SAVE

#### Edit folders\*

- Select the FOLDER PENCIL icon on the top of filing tree 
  - Edit folder/select SAVE

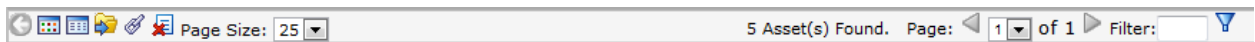
#### Delete folders\*


- Select the FOLDER - icon on the top of filing tree 
  - As a precaution, only folders with no files and no sub folders can be deleted
  - You will receive a message confirming the deletion or listing the number of files and sub folders to be deleted before the action can be completed
  - Select SAVE

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## Folder View

Select a folder to view files. From the top bar in the folder, select from these additional capabilities.



- Back arrow—to return to previous page
- Change view—to view files as thumbnails or in a list
- Move files to other folders\*
  - Select the file to be moved by checking the top left corner next to the file
  - Select FOLDER ARROW icon
  - Select the folder from the filing tree where the file is to be moved
- Link files to other folders
  - Select the file to be linked by checking the top left corner next to the file
  - Select LINK icon
  - Select the folder from the filing tree where the file is to be linked
  - NOTE:** By updating the original file, you will automatically update all linked files
- Delete files
  - Select the file to be deleted by checking the top left corner next to the file
  - Select FILE X  icon
  - You will be presented with a message asking confirming you want to delete the file/Select OK to delete
- Page Size
  - Change the number of files viewed per screen or page with the pull down menu

- # of files in the folder
- # of pages for this folder
  - Select a page number from the pull down menu to jump to that page
- Folder filter- you can filter alphabetically by the file name

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## Comment Tracking & Collaboration

Enables you to invite other Library users to collaborate on a file, capture & track comments from all invitees in one location, for all versions of the same file.

- Select ATTRIBUTES icon under a file
- Select COMMENTS tab
  - Select the PEN icon to open a dialogue box
    - Enter your message to accompany the file link
    - Select Library users to receive the file link and message
    - Select SAVE & EMAIL
- Recipients receive a link that takes them to the file thumbnail. (If the recipient is not logged into the Center, they will be taken to this page upon signing in.)
  - Click the PEN icon to add comments
    - Select SAVE & EMAIL to send comments back to the file owner only
    - Select other Library users from the pull down menu and select SAVE & EMAIL to send comments back to additional users
  - View all comments for a file version, for all versions by all user and by date
  - Print a log of all comments by selecting the PRINTER icon

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## View Cart

Files placed in the cart by you or other users are visible when you select VIEW CART from the top navigation bar

- Download files from cart
  - Select files to be downloaded using the check box at left
    - File formats can be converted prior to download by selecting new format from pull down menu
    - File resolutions can be converted by selecting lower resolution from menu
- Email files from cart
  - Select files to be downloaded using the check box at left
    - For added security you can protect cart contents by entering a password that will be required by the recipient
  - Select EMAIL
    - Outlook will open with a link to the cart in the message box

- Recipients will receive a link to the cart where they can see all files sent, convert file format and resolution, and select files for download
- Remove selection to empty cart
  - Select files to be removed using the check box at top left
  - Select REMOVE


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## Attribute Set Up

- Additional file attributes make it easy to identify, search & relate files
  - BEST PRACTICES:** Set up file attributes to add additional detail to files based on the way your company uses and accesses files. Here are a few of the ways our customers use attributes to help them more easily find what they need
    - Territory, market, country
    - Product, product categories, product specs or applications
    - Case study topics
    - Industry
- Attribute Groups are assigned at the folder level; all files uploaded to the same folder will have common attributes
- Attributes are organized in Attribute Groups from your Master Attribute List so that like attributes are more easily added to folders
- Attributes that are automatically assigned to each file include:
  - File name, type, size
  - Review date or the date when a file is to be reviewed for archiving: default is one year
  - Date uploaded
  - Name of the user who uploaded the file
  - Name of the file 'owner': default is the user who uploaded the file



### Set up Master Attribute List

Master Attribute List		Attribute Groups				
Name	Tab	Instructions	Req.	Valid	Link	Relate
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


- Fill out the Name of your new attribute and any other corresponding fields
  - **Instructions**  
Describes how attribute is to be used and appears as a hover-over in the folder
  - **Valid**  
Allows you to create a drop down list of choices to select for the given attribute.  
Select the valid field/ select SAVE/select clipboard icon  then add the drop down options
  - **Relate**  
files related to one project, one client, one job number, etc. can be linked by populating attribute fields on like files with the same data. When this field is checked you may navigate from one related asset to another.

## Set up Attribute Groups

Attribute	Tab	Sort	Req.	Hide	Review
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Select Library/select Attribute Setup from the top navigation bar
- Click on the button next to Attribute Groups
- Click on the Add Attribute Group icon 
- Fill out the attribute group Name and click SAVE icon 

### Add Attributes to a Group

- Select the attribute group from the drop down list
- Select the attribute you want to add from the drop down list and click SAVE icon 
- Optional features that you can add to attributes include:
  - **Tab**  
Allows you to organize attributes under tabs so a user can locate file information quickly  
Select Attribute Group/Select Attribute and enter Tab name
  - **Sort**  
Allows you to align all attributes in the order you wish them to be placed.  
Select the attribute edit or PENCIL icon, and enter the sort number

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## Reports

- **Catalog**  
Shows all files uploaded to select folders within a date range
  - Select date range on the right
  - Select from pull down menu text report or thumbnail report
  - Select from pull down menu if you want file attributes included in the report
  - Select ALL FOLDERS is the default for this report/to select specific folders, uncheck ALL FOLDERS and select the folder
  - Select DISPLAY REPORT/Select PRINT Icon on top left to print report
- **Upload**  
Shows all files uploaded to select folders within a date range by a user
  - Select date range on the right
  - Select users from pull down
  - Select ALL FOLDERS is the default for this report/to select specific folders, uncheck ALL FOLDERS and select the folder
  - Select DISPLAY REPORT/Select PRINT Icon on top left to print report
- **Filing Tree**  
Shows your filing tree with all parent and descendant folders
- **Workgroup**  
Shows user's workgroup assignments. Sort report by workgroup or by user
- **Security**

- Shows Library folder access by workgroup. Sort report by workgroup or by folder
- **Activity**
  - User Activity Report – shows functions of users within a date range
    - Select the date range
    - Select ALL USERS or an individual user
    - Select ALL FUNCTIONS or a single function
    - Select INCLUDE ASSET NAME in report or leave unchecked
    - Sort report by User, Function or by date
  - Administrator Report—shows functions of administrators within a date range
    - Select the date range
    - Select ALL or an individual administrator
    - Select ALL FUNCTIONS or a single function
    - Sort report by Administrator, Function or by date
  - Asset Activity Report—doesn't work? Should be File Activity Report if we keep it
- **Company Usage Report**  
Shows space allotted and used of allotted and actual users for this Quantum Center