

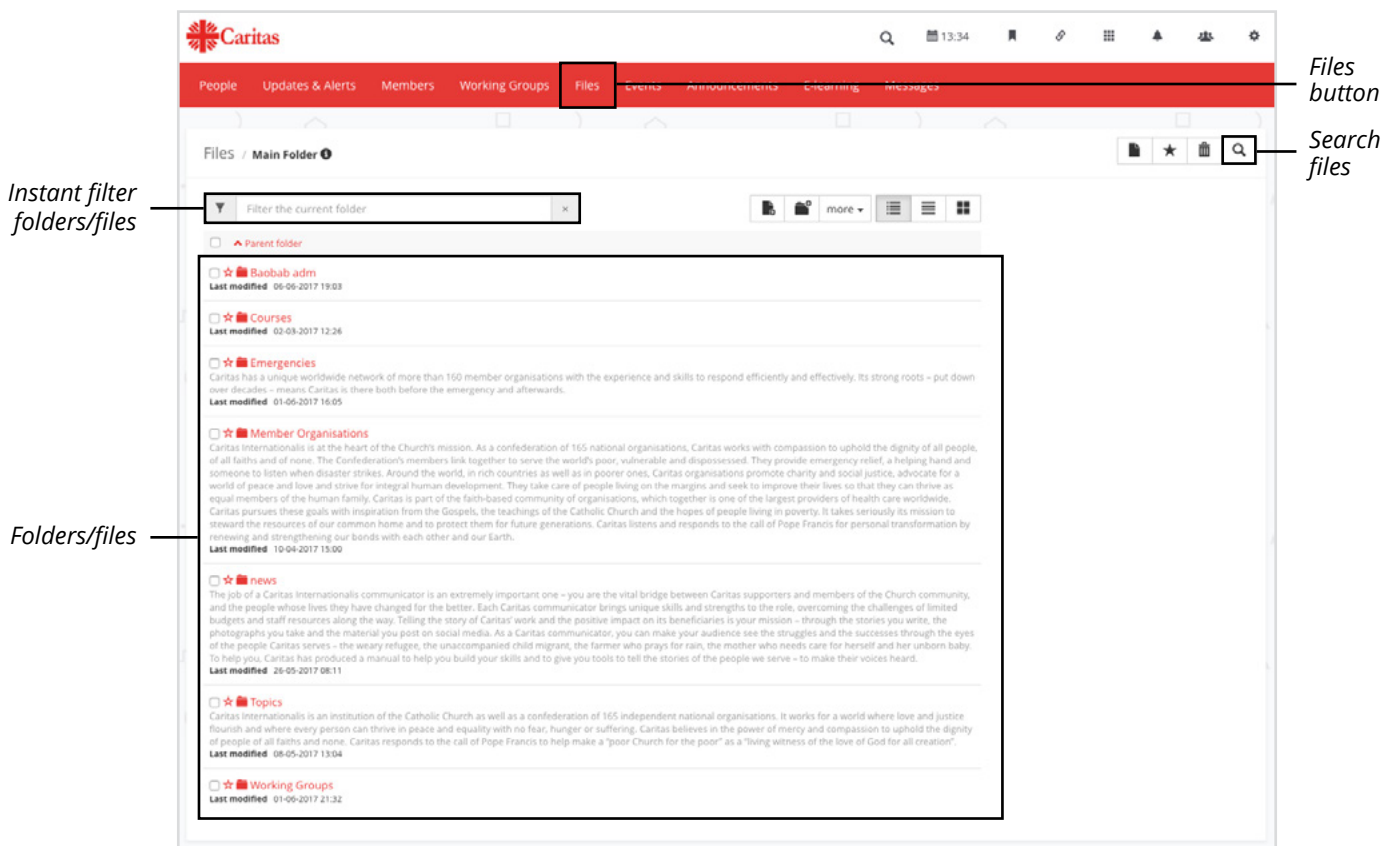
# Files Guide

<b>1</b>	<b>Files.....</b>	<b>2</b>
1.1	Files overview.....	2
<b>2</b>	<b>Folders.....</b>	<b>3</b>
2.1	Add folder.....	3
2.2	Edit folder.....	3
2.3	Delete folder.....	4
<b>3</b>	<b>Documents.....</b>	<b>5</b>
3.1	Add document.....	5
3.2	Preview document.....	7
3.3	Download document.....	8
3.4	Checkin/checkout (document versions).....	9
3.5	Delete/restore document.....	10

# 1 Files

## 1.1 Files overview

When clicking **'Files'** in the main navigation bar along the top of the site, you will land on the main files page, which displays the list of folders and files (after clicking 'Main Folder').



Files main page

You can use the instant filter field to filter the documents list in the current folder by keywords. To clear the filter, click the cross icon in the instant filter field.

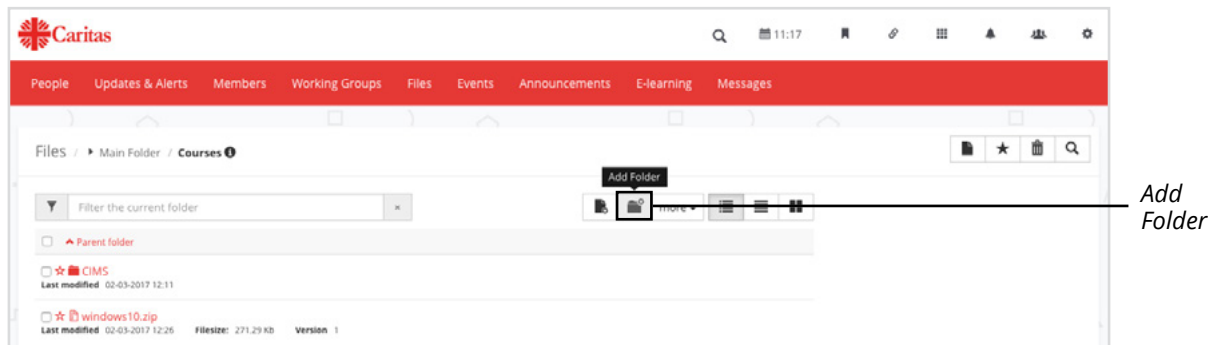
Navigate through the folders to find the required subfolder or document, by clicking on the folder name. Click **'^ Parent folder'** at the top of the folders/files list to go back to the previous folder you were in. Keep clicking it to go back to the Main Folder.

You can also search all folders and files using the search files button.

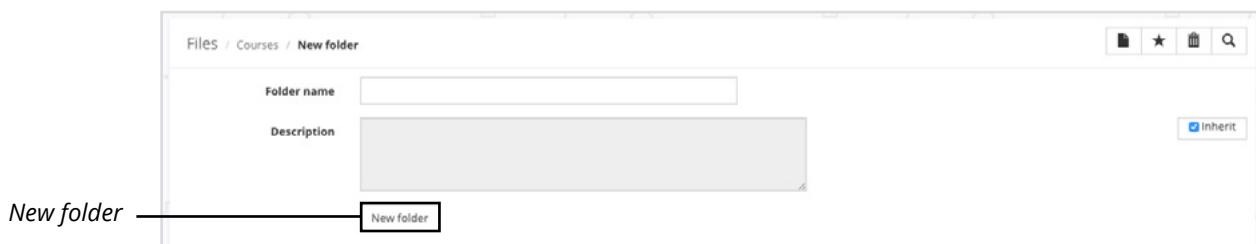
## 2 Folders

### 2.1 Add folder

In the location you wish to create a folder, click the **'Add Folder'** icon.

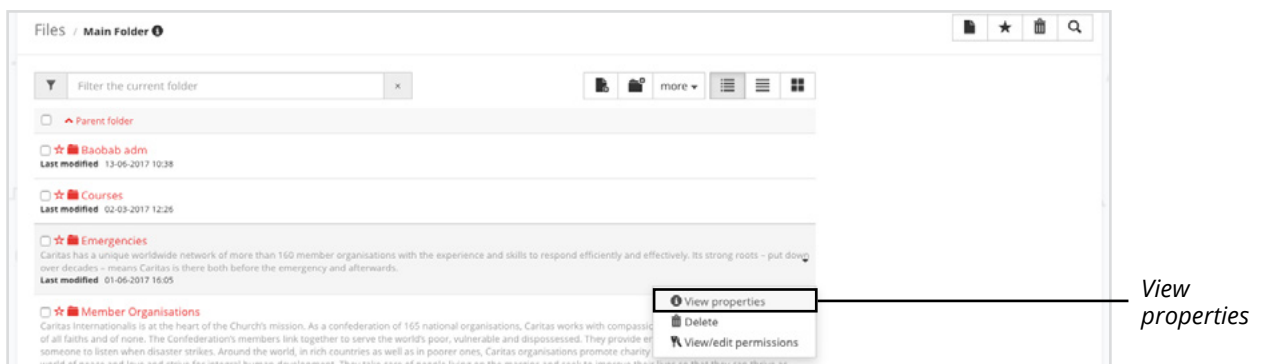


Specify the folder name, and add a description if required (toggle the inherit checkbox to enable the description field) and click **'New Folder'**.

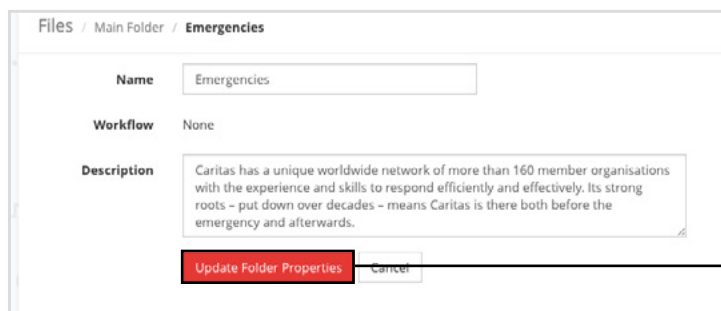
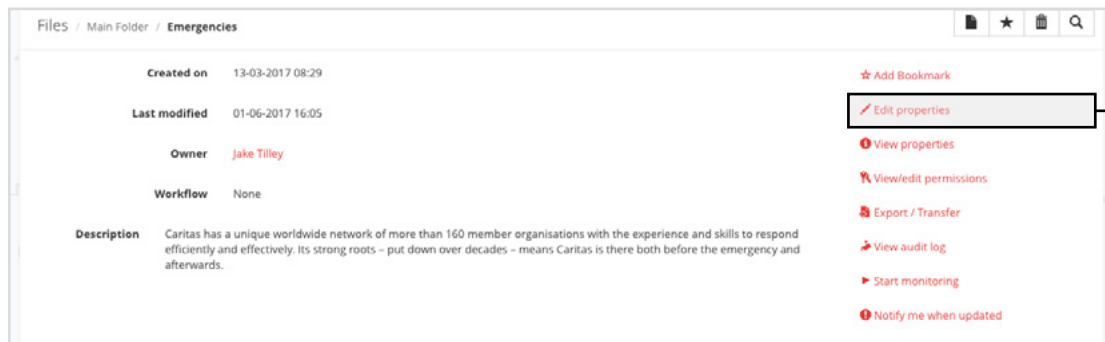


### 2.2 Edit folder

To edit the details of a folder hover over the folder and click the drop down arrow to the right of the folder name. Click **'View Properties'**.

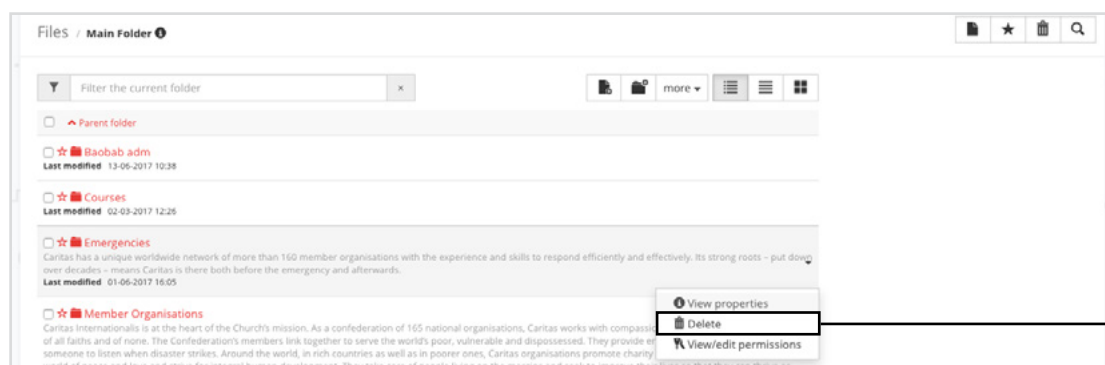


To edit the folder details, click **'Edit properties'** on the right hand side. Here, the folder can be renamed, and metadata can be modified. Click **'Update Folder Properties'** to save changes.



## 2.3 Delete folder

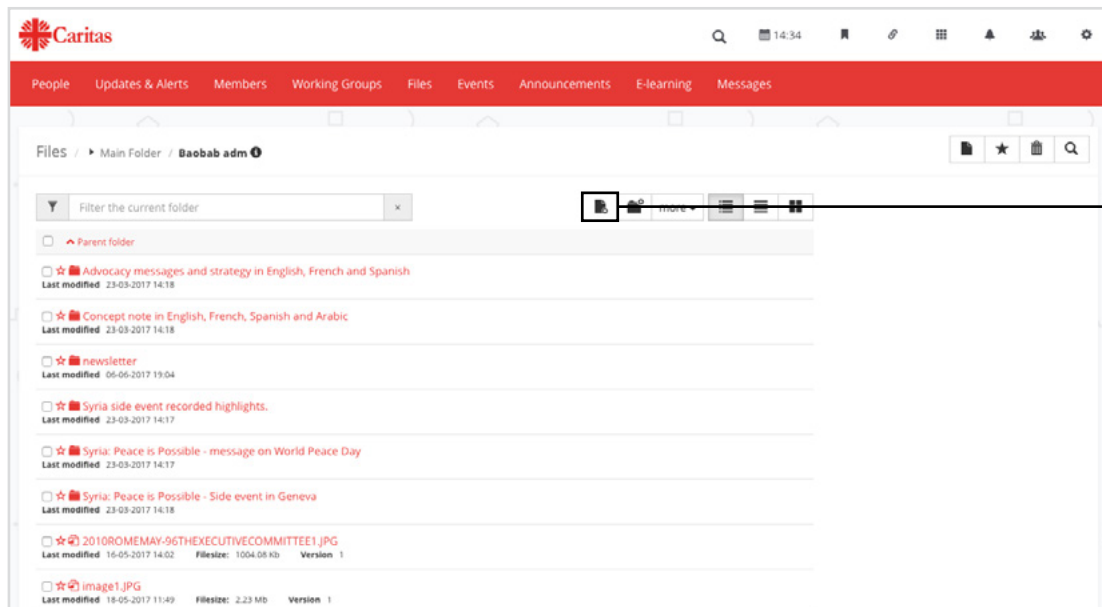
Hover over the folder and click the drop down arrow to the right of the folder name. Click **'Delete'** in the drop down. Then click **'Confirm delete'** in the pop up dialogue box.



## 3 Documents

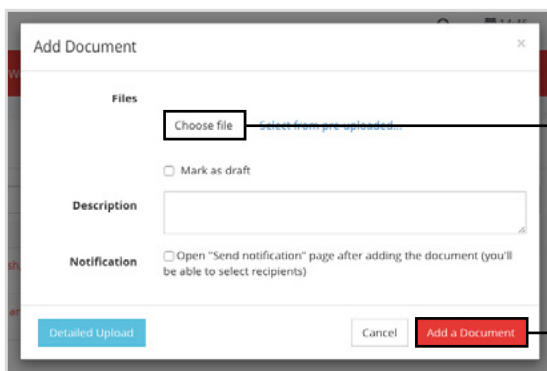
### 3.1 Add document

In the folder you wish to add a document, click the **'Add Document'** icon.



*Add Document button*

In the Add Document box that appears click **'Choose File'** to choose a file to upload. Specify a description (optional) and select the notification checkbox, if required, to send a notification to specified users that you have uploaded a file.

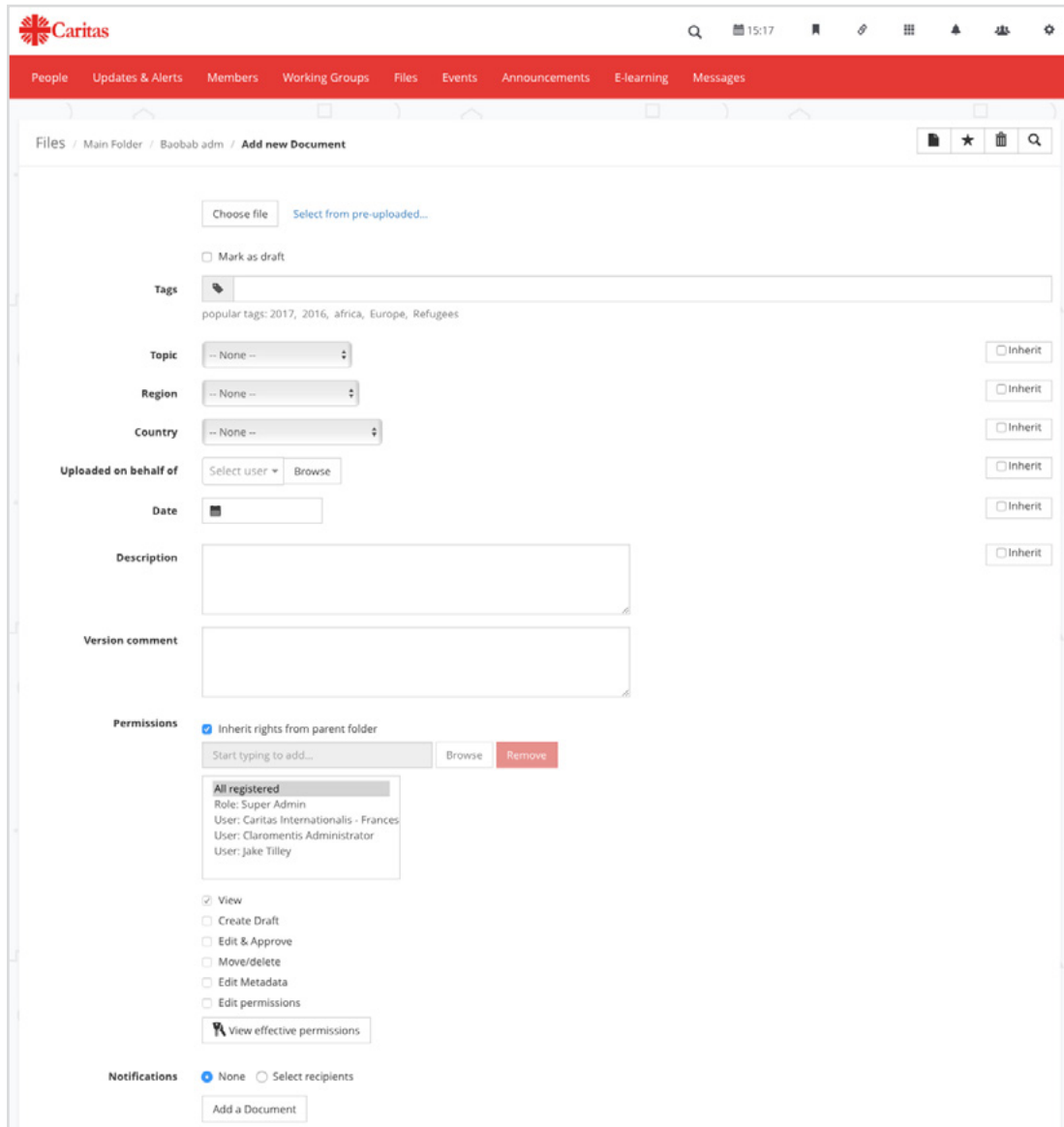


*Choose file button*

*Add a Document*

Click **'Add a Document'** to upload your file.

Alternatively, click '**Detailed Upload**' to supply further information.



The screenshot shows the 'Add new Document' form in the Caritas Files interface. The form is titled 'Files / Main Folder / Baobab adm / Add new Document'. It includes a 'Choose file' button and a 'Select from pre-uploaded...' link. There is a 'Mark as draft' checkbox. The 'Tags' field has a search icon and a list of popular tags: 2017, 2016, africa, Europe, Refugees. The 'Topic', 'Region', and 'Country' fields are dropdown menus, all currently set to '-- None --'. The 'Uploaded on behalf of' field has a 'Select user' dropdown and a 'Browse' button. The 'Date' field has a calendar icon. The 'Description' and 'Version comment' fields are text areas. The 'Permissions' section has a checked 'Inherit rights from parent folder' checkbox, a search box for users, and a list of users: 'All registered', 'Role: Super Admin', 'User: Caritas Internationalis - Frances', 'User: Claromentis Administrator', and 'User: Jake Tilley'. Below this is a list of permissions: 'View' (checked), 'Create Draft', 'Edit & Approve', 'Move/delete', 'Edit Metadata', and 'Edit permissions'. There is a 'View effective permissions' button. The 'Notifications' section has radio buttons for 'None' (selected) and 'Select recipients', and an 'Add a Document' button.

### Detailed file upload

- **Tags:** Simply enter the tag names required, separated by a comma. Popular tags are displayed under the tag field.
- **Topic, Region, Country:** Select the required entries from the dropdown lists.
- **Uploaded on behalf of:** If you are uploading a file on behalf of another user select their username here.
- **Date:** Choose the date you want to display next to the document when being viewed.

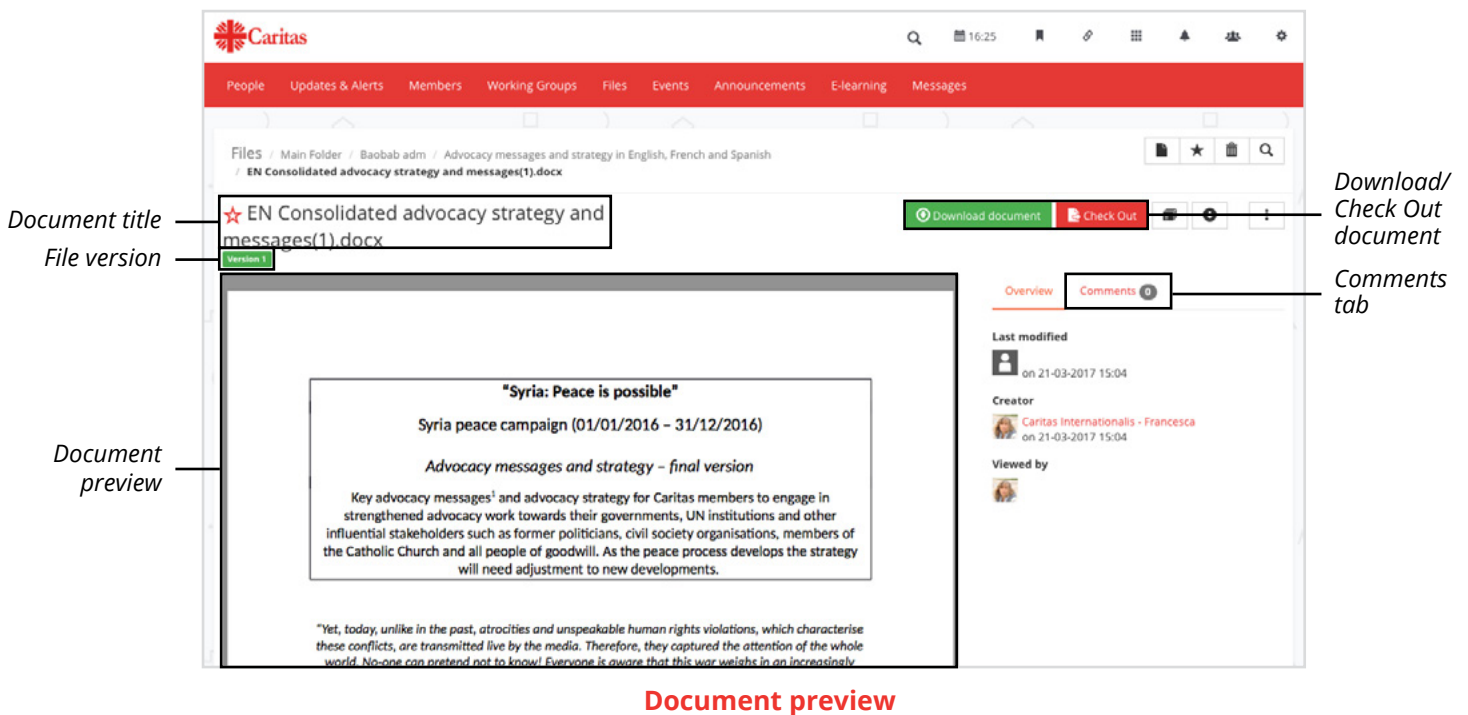
- **Description, Version comment:** Add the file and version description if required.
- **Permissions:** Permissions can be modified for the specific document.
- **Notifications:** Select the required option.
  - *None:* No notification will be sent.
  - *Select recipients:* After clicking Add a Document, the user can select which users should be notified, from a list of all users with view rights.

Click **'Add a Document'**.

**TIP:** Multiple files can be uploaded in a similar way. Click **'Choose file'** to choose additional files to add. All files added will be stored as separate documents.

### 3.2 Preview document

To preview a document, click the document name.  
A preview of the document will be displayed.

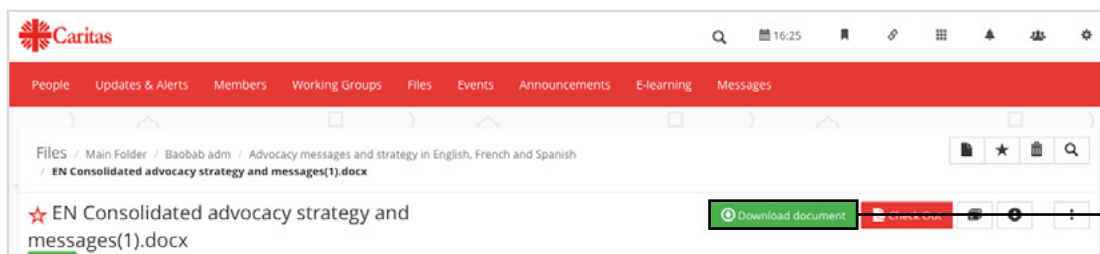


Toggle between the tabs on the right hand side to view details of the document.

- The 'Overview' tab lists tags, last modified and created dates, and who has viewed the document. If applicable, this tab will also list the number of document versions, and any personal reminders that have been set.
- The 'Comments' tab allows users to view and add comments to the document.

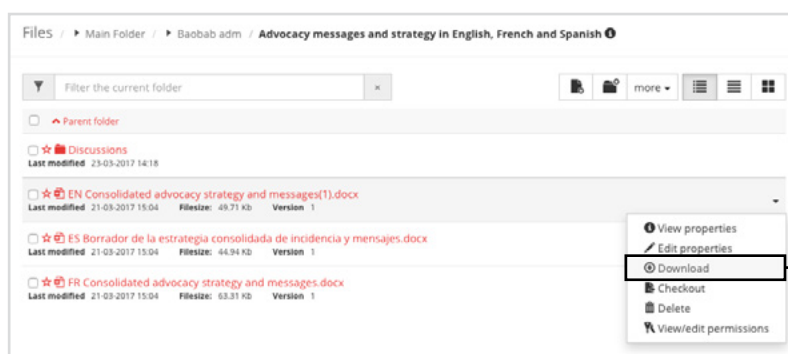
### 3.3 Download document

Click the 'Download document' button to download and save the file in its original format.



*Download document*

**TIP:** The document can also be downloaded directly from the document list by clicking '**Download**' from the drop down.



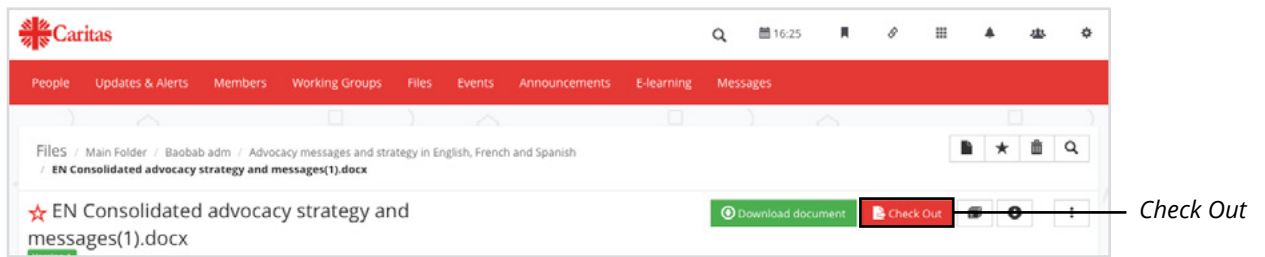
*Download document*



### 3.4 Checkin/checkout (document versions)

To modify a document and upload an updated version, it should first be checked out. If a document is checked out, other users can view and download the latest version, but are unable to check it out at the same time. This is to avoid document conflicts.

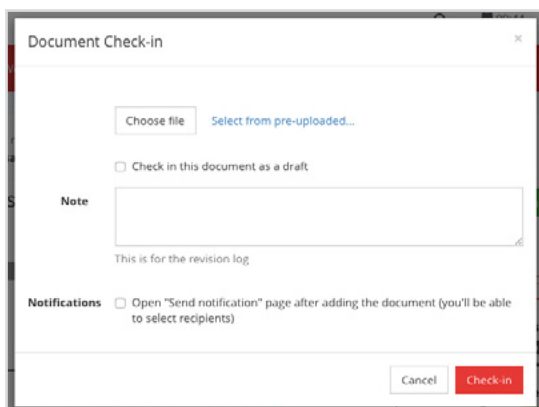
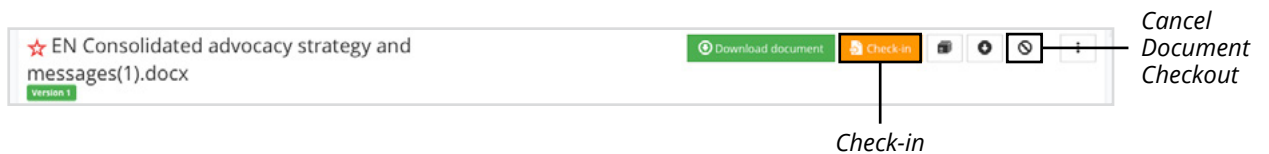
On the document preview page click the **'Check Out'** button.



A pop up will be displayed, allowing you to choose whether or not to download the document, or just mark it as checked out. Click **'Check-out'**.



Once clicked, the icon will change to the yellow **'Check-in'** button. While you have a document checked out other users are unable to also check out the document.

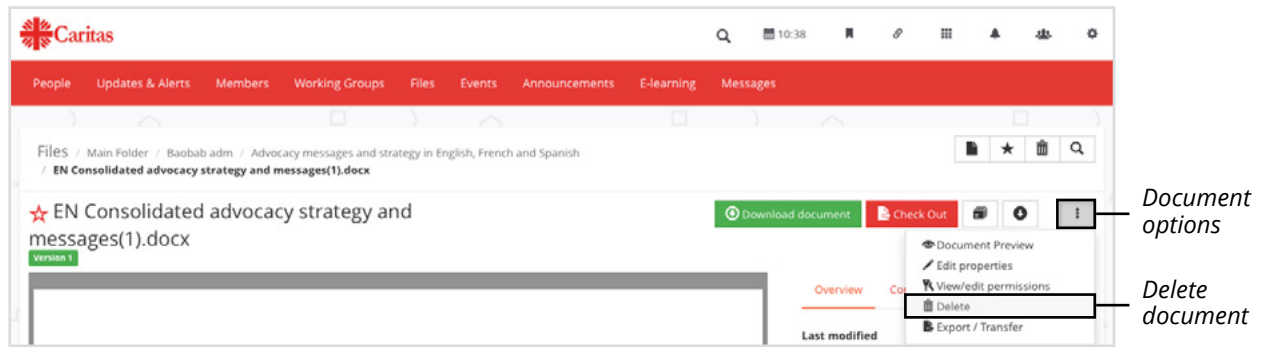


To check the document back in and upload the edited version, click the yellow **'Check-in'** button. Upload the new document version and click **'Check-in'**.

Alternatively, click the **'Cancel Document Checkout'** icon to cancel editing.

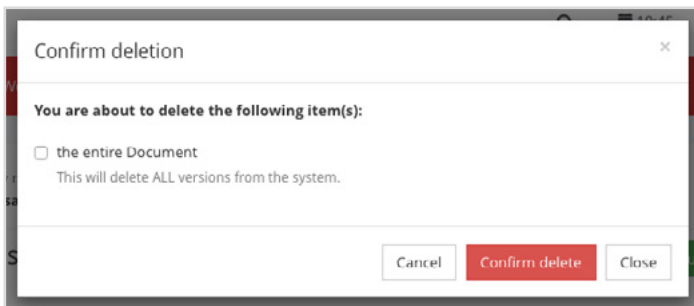
### 3.5 Delete/restore document

You can delete a document from the document preview page. Click on the document options button (3 little dots to the right of the document preview) and click on **'Delete'**



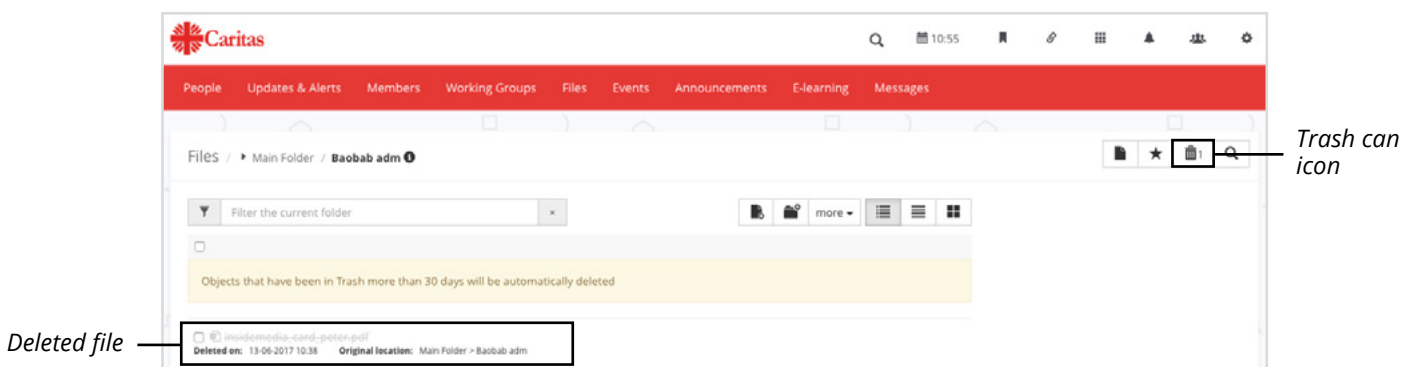
Document preview

You can then choose to delete just that version of the document by clicking **'Confirm delete'** or the entire document which will remove all versions of the file previously uploaded by ticking the checkbox.

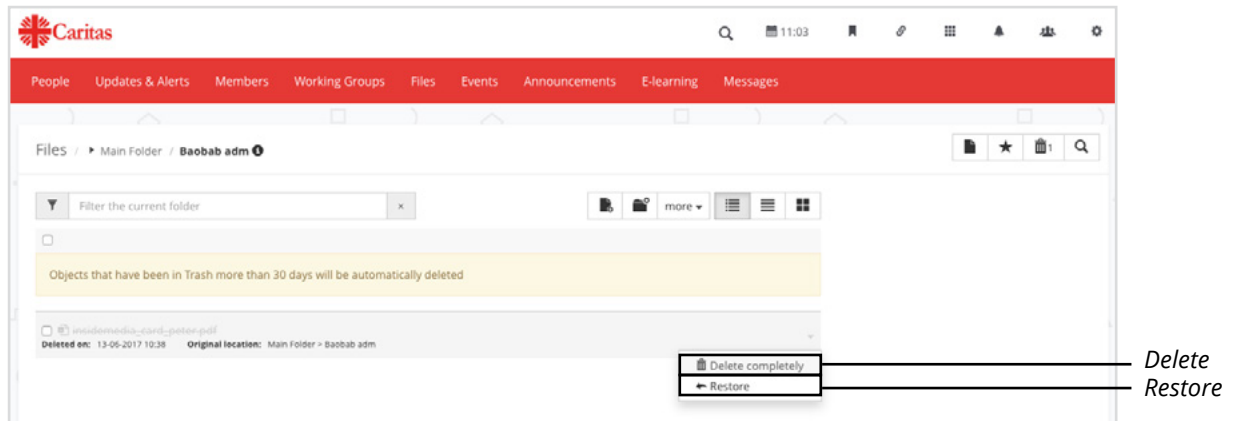


**PLEASE NOTE: All objects deleted are automatically placed in the trash can.**

Click the 'Trash can' icon in the toolbar to see your deleted files. The number of objects currently in the trash can is displayed on the icon.



Items placed in the trash can are automatically deleted after they have been in the trash can for 30 days. To permanently delete a file hover over the document and click the drop down arrow to the right of the file name. Select **'Delete completely'** from the drop down.



Alternatively, you can restore the document by selecting **'Restore'** from the same drop down.