

## Online Documents: Downloading your Policy Manual or other Document Collections

Storing Online Documents is a feature of both BoardBook Premier, and BoardBook Manuals. This feature allows you to make documents easily available to your users, and or public

In this document we will cover the following subjects:

- Fundamentals related to the 'Download Documents' tool
- Navigating to the tool
- Selecting the documents to be downloaded
- Options for the download

NOTE: To perform this action a user must have the 'Document Manager' permission.

### Fundamentals

Only files eligible for download can be included. When adding or managing your online documents a setting controls whether downloads are allowed or prevented for each individual file. Any file sent to 'Display in PDF Viewer Only (Prevent Downloads)' will simply not appear on the list where you can select which documents to include.

The tool can take several minutes to generate the results and send the download email.

This tool generates an email, which is sent to the email address associated to the user's account. This email will have a download link which can be clicked to download the PDF or Zip created by the tool.

### Getting to the tool

BoardBook Premier users can get to this tool by clicking either 'Documents', or 'Policies' in the Gray Menu Bar then selecting 'Manage Document Types'. Manuals users will click 'Policies' in the Gray Menu Bar then selecting 'Manage Document Types'.

For BoardBook Premier users, this screen will list a mix of system and custom document types. In the second column for each custom document type options for 'View Documents', 'Manage Documents', and 'Download Documents'. For this document we are only interested in 'Download Documents'.

For Manuals users, in the second column, we will see three options, 'View Documents', 'Manage Documents', and 'Download Documents'. For this document we are only interested in 'Download Documents'.

### Selecting Documents to Include

Once we've clicked on 'Download Documents', we'll be brought to a screen which will list the folders and files within the selected document type. Note, as mentioned above, only documents eligible for download will be listed.

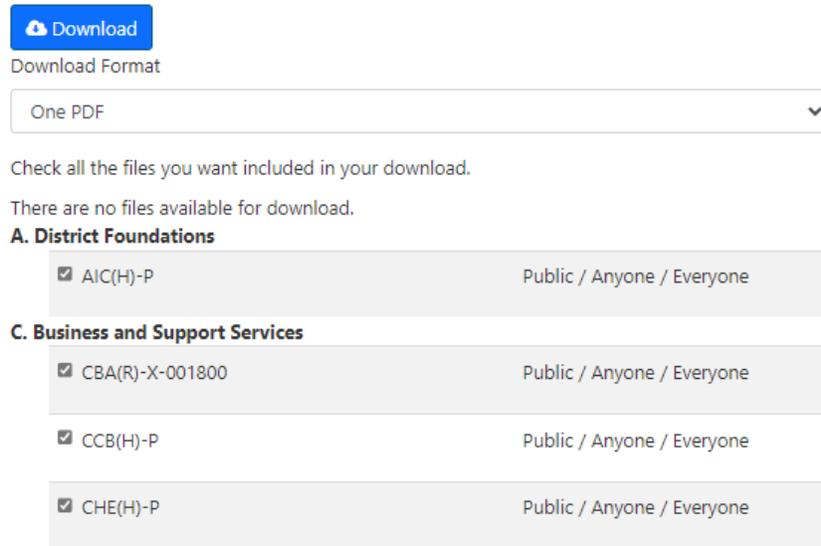
As seen in the screenshot below, we'll see the following:

A Download button (found both at the top and bottom of the screen.

A Download Format drop down

Folder names

A list of available documents showing the name and permission of the document.



Use the check box appearing next to each document to either include (check) or exclude (uncheck) a document from being included in the download.

### Options for Download

Just below the 'Download' button at the top of the screen we have a 'Download Format' setting. Here we will use a drop down to select one of three choices:



**One PDF:** This produces a single PDF which contains the checked documents in the order they appear on the screen.

**In a Zip file:** This produces a single Zip file. This Zip file contains individual folders which then contain a PDF file for each of the individually checked documents.

**Original Format:** This produces a single Zip file. This Zip file contains individual folders which then contain each individually checked file in its originally uploaded format. This might be Word, Excel, PowerPoint, or other file formats.