

Online Documents – Managing Files and Folders

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 specific document we will cover the following subjects:

- General structure
- The Documents Screen
- Creating and Managing Folders within a Document Type
- Uploading and Managing your Documents
- Controlling Access to your Documents
- Updating existing Documents

NOTE: To manage your Documents a user must have the ‘Document Manager’ permission.

Naming conventions for this handout:

For simplicity ‘Document Types’ will simply be referred to as File Cabinet Drawers.

BoardBook Premier (our meeting and agenda management tool) will simply be called Premier

BoardBook Manuals (our policy storage tool) will simply be called Manuals

General Structure

- Overall:** Think of a filing cabinet. For users with BoardBook Premier, this filing cabinet has five drawers. For our Manuals customers the cabinet has a single drawer.
- Document Types:** These are the cabinet drawers. BoardBook Premier customers by default start with two drawers named ‘Documents’, and ‘Policies’. These drawers can be reconfigured or, up to three new drawers added. The ‘Style’, and ‘For Users’ settings can be set or updated as needed. For Manuals customers the single drawer is named ‘Policies’ by default. Within these drawers we can add folders.
- Folders:** Except for the [No Folder], we are free to add or update the folders we want. The [No Folder] is a system folder and is used as a safety net. If you were to delete a folder containing files, those files would be automatically preserved in the [No Folder]. The [No Folder] can be removed or renamed if needed. Contact us for help with this.
- Files:** Files are added or updated within folders.

The Documents Screen

The Document screen is where you will add, rename, or delete folders, or upload, update, delete or set permissions for files within any of your file cabinet drawers.

Navigating to the Documents Screen:

For Manuals or Premier customers who will be updating documents in a 'Book Type' 'Document Type such as Policies, in the Gray Menu bar click on Books, then the name of your file cabinet drawer, then manage.

For Premier customer updating storage type file cabinet drawers in the Gray Menu bar click on Documents, then the name of the file cabinet drawer.

For Premier customers, all file cabinet drawers regardless of type can be accessed by going to the Gray Menu bar, clicking Documents, then choosing 'Manage Document Types'. On this page clicking 'Manage Documents' in the second column for the appropriate row will let you manage the documents for that file cabinet drawer.

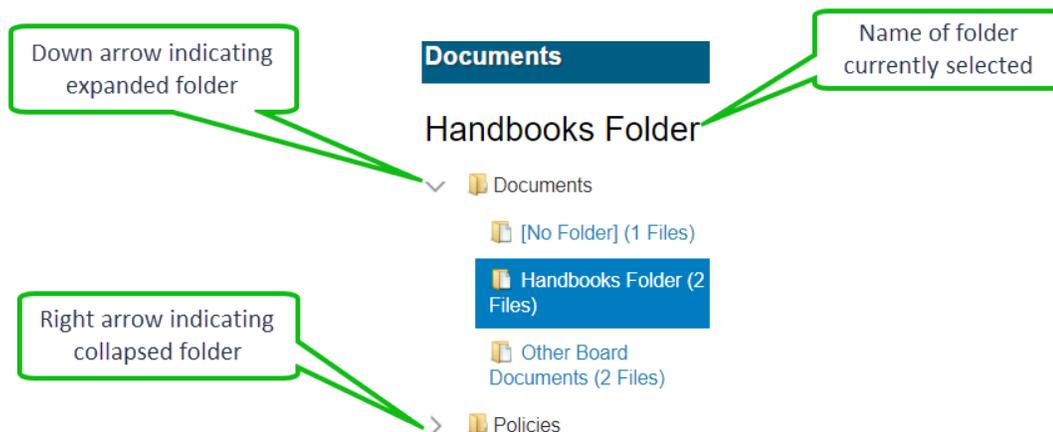
On the Documents Screen:

The screen is laid out to show your document folder structure in a sidebar on the left and any documents within a selected folder in the central area.

The sidebar will show a folder structure much like your hard drive. As with a hard drive, folders can be expanded, collapsed, added, deleted, or renamed.

Folders shown in the sidebar come in three types:

Main folders, are the specific names of your file cabinet drawers. In the screenshot below you can see these match Documents and Policies which are created by default in Premier, for Manuals customers only Policies will be seen. These main folders may be collapsed or expanded. A folder preceded by a right facing arrow is collapsed. Clicking on the arrow will expand the folder showing any folders within that folder. A folder preceded by a down facing arrow is expanded. Clicking on the arrow will collapse the folder.



Within each main folder, you can see a special folder named [No Folder]. The [No Folder] is a system folder and is used as a safety net. If you were to delete a folder containing files, those files would be automatically preserved in the [No Folder]. The [No Folder] can be removed or renamed if needed. Contact us for help with this. This folder will not appear on the public page unless there are public accessible documents in the folder.

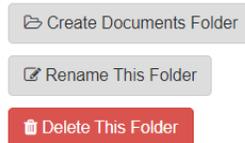
In the screenshot above, within the main folder titled 'Documents' you will also see two 'Document Folders' named 'Handbooks' and 'Other Board Documents'. Document Folders are a way of

segregating files within a Document Type. Document Types may contain folders, Document Folders cannot.

NOTE: Both 'Document Types' and 'Document Folders' are automatically sorted alphabetically.

Creating and Managing Folders within a Document Type

Creating a new folder: In the Document screen sidebar expand the folder for the document type where you wish to add a folder. Click on either an existing folder within the document type, or the [No Folder] within the document type. In the screenshot below see the 'Create Documents Folder', 'Rename This Folder' and 'Delete This Folder' options



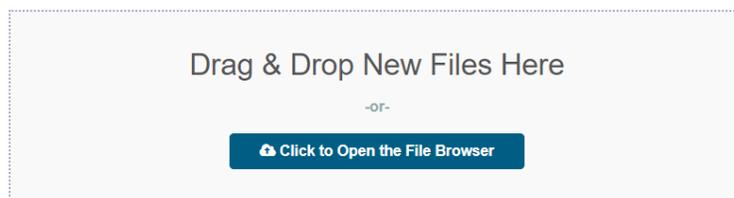
Note: If you've clicked on the [No Folder] you will only see the create folder option. In the sidebar below the list of folders you'll see a 'Create 'name of main folder' Folder'. Click this to add a new folder. As previously noted, your folder will be added in alphabetical order.

Renaming an existing folder: In the Document screen sidebar expand the folder that contains the folder you wish to rename. Click on the folder. In the sidebar below the list of folders you'll see a 'Rename This Folder' button. Click this to rename your folder.

Uploading and Managing your Documents

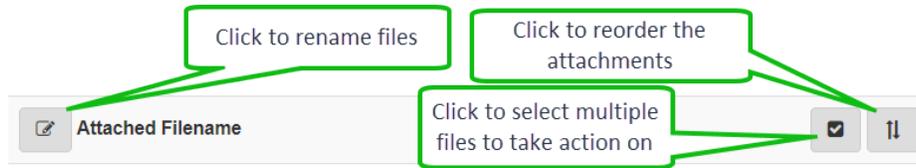
Note: If you are familiar with working with attachments, uploading and managing documents work largely the same way.

Uploading a document: In the Document screen sidebar expand the folder for the document type where you wish to add a file. Select the specific folder, or the [No Folder] where you wish to add the file. In the main area of the screen, you will see a gray 'Drag & Drop New Files Here' area containing a 'Click to Open the File Browser' button. Either of these methods can be used to add a document. Note multiple documents can be added at the same time by holding down the Ctrl key when selecting the files.



Managing your documents: In the Document screen sidebar expand the folder for the document type where the file you wish to manage is located. Select the specific folder, or the [No Folder] containing the file.

The Documents Header: Whether you have one, or many documents in the folder the documents header will contain buttons allowing you to rename, reorder, or take bulk action on multiple files as described below:



Rename a file: Click on the gray 'Rename Files' button (in icon representing a tablet with a pencil) on left in the gray area just above the top attachment. Note, once clicked this becomes a Save button. This will allow you to edit the names of any of the files in the folder. When you are done be sure to click the Save button.

Reorder files: Click on the 'Reorder' button (an icon with up and down arrows) on the right in the gray area just above the top attachment. Once clicked a 'Save' button will appear to the left of the 'Reorder' button. Next to the save button you have additional buttons to automatically reorder alphabetically or numerically, additionally you can drag your files up or down to place them in the order you want. When you are done be sure to click the Save button.

Take bulk action: Click on the 'Take bulk action' button (an icon with a dark box with a check mark). This will provide a new header and a simplified listing of your files. Each file will have a check box, the file name, and the current file permission. In the header is a permission drop down, a folder drop down (used to move files to a different folder within the main folder), and a trash can icon. Check the files you wish to take action on and then use the permission drop down, the folder drop down, or the trash can icon to make the changes you wish on the checked files. When you are done click the x at the right side of the header to return to the normal view.

Actions for individual files:

In the screenshot below you can see the general actions that can be taken for a file once it has been uploaded.

Note that clicking directly on the file name will take you to a screen with additional options. These 'Additional Options' will be covered after the 'General Options' are covered below.

Note that clicking directly on the version information for a file will allow you to manage versions that have already been uploaded. These 'Version Options' be covered after the file additional options are covered below.

General Options

The image shows a file management interface with several callouts pointing to different elements:

- Click to view file**: Points to the file name "Sample Attachment".
- Manage versions of the file**: Points to the version information "Version 1" and "10/14/2019 at 3:25 PM".
- Manage permissions on the file**: Points to the "Agenda Managers" dropdown menu.
- Move the folder to a different folder within the same Document Type**: Points to the "[No Folder]" dropdown menu.
- Update the files download / view options**: Points to the "Display In PDF Viewer Only (Prev" dropdown menu.

The interface includes a file icon, a red trash can icon, and a "Set Committee Permissions" link.

Sample Attachment

Click to view file

Manage permissions on the file

Version 1
10/14/2019 at 3:25 PM

Manage versions of the file

Agenda Managers



Set Committee Permissions

Move the folder to a different folder within the same Document Type

[No Folder]

Update the files download / view options

Display In PDF Viewer Only (Prev

Additional Options

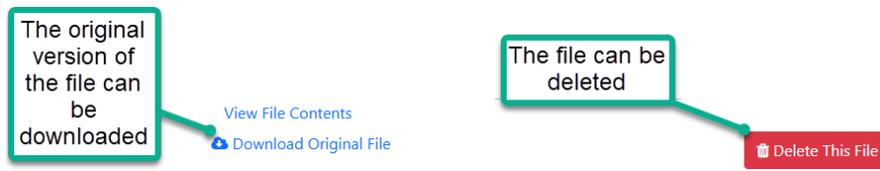
These Additional Options are available by clicking directly on the name of the file.

The screenshot shows a form titled "Sample Document.docx Version 2". It includes an "Upload" button, a text area for "Document Description", a dropdown for "Document Permission Level" (set to "Public / Anyone / Everyone"), and a dropdown for "Document Folder" (set to "[No Folder]").

Annotations with callouts:

- Upload button is used to add a newer version of the file
- The file name can be changed
- A description can be added or edited
- The file permission changed
- The file can be moved to a different folder

Between the upper and lower tools, a preview of the file is shown:



Version Options

Managing the version of a file to be displayed, removing or reviewing older versions are all handled under Version Options. Version Options are available by clicking directly on the 'Version' of the file.

Note that a new version of a file is added by clicking on the filename itself and then choosing 'Upload'. This is explained above in the 'Additional Options' section.

The screenshot shows a "Versions" dialog box for "Sample Document". It lists "Sample Document Version 2" as the "Current Version" and "Sample Document Version 1" as an "Older Version". A toolbar at the bottom right contains icons for deleting, creating a new version, and reactivating a version.

Annotations with callouts:

- Click on the Version
- This is a prior version
- This is the current live version
- Click to remove this version
- Click to reactivate as the live version
- Click to create a new copy of this version

As you can see above clicking on the version of the file allows you to view and manage prior versions including deleting, reactivating, or copying any of the prior versions.