

After logging in, hover over “Downloads”. Further “quick link” bookmarks will drop down. If the name contains a folder to the left, it means it is a link to folder, while an image of a disk indicates it is a direct link to download a file. To add a new file, click on either “Downloads”, if a folder does not appear on the dropdown list (Promotion, Newsletters, Guides, etc), or on the respective folder’s name, if it does.



After clicking on the preferred folder, you will see something that resembles the screen above. Many people will not have the option to manage downloads for more than 1 group, but if you do, pay close attention to the group dropdown in the upper right corner. Depending on which group is selected, different files/folders will be displayed. You can browse for any file/folder in the box in the upper-left corner.

Right above the listing of files, there will be a “tree”, showing which folder you are in, and it’s position relative to “Home” (Home > Company Files, in the above case). Below this, you will see a listing of all files you have permissions to access. If a description has been entered, you can hover over the name of the file/folder, and it will display the entered description. Files/folders can have an expiration date (promotions, for example). If they do, the expiration date will be displayed to the right, otherwise, it will just say “Never”.

If you are able to edit the file/folder, a pencil/paper will appear to the left of the name. If there is a folder icon, it means there are further files/folders below the current folder. To view them, click on the name of the folder (for example, “Guides”, in the above screenshot). If it is a downloadable file, at least 1 file will appear below it, with the file “type” image. The icons displayed in the above screenshot mean these are executable files (.exe files). Valid file types are: jpg, png, bmp, gif, doc, pdf, dxf, dwg, zip, ppt, exe. You can add more than 1 file “type” to each download, and still maintain the same name/description. This is useful, for example, to make the same set of plans available in dxf , pdf, and dwg formats. Rather than having to enter the same description to each format, just add each download within the same “file” (this will make more sense in a minute). To download the file, simply click on the respective icon. To delete a file/folder, click on the garbage can to the right. To add a new file/folder, click on “Add File / Folder” that appears on the right, above the file listings.

Information
Permissions

Name:

Parent Folder: Move Document

Start Date: (mm/dd/yyyy)

Expire Date: (mm/dd/yyyy)

Display
(After "Start Date" if specified, or immediately if not)

Description:

B I U ABC | Styles | Format | Font family | Font size

Upon editing or adding a new file/folder, you will see a screen similar to the above screenshot. In the "Information tab", you will see a spot to enter the file/folder's name. You will also see the "Parent Folder", and the option to move this file/folder to a different folder. To move it, simply click on "Move Document", navigate to the correct folder, and click on "Select", for the respective folder.

Below that, you will see a start date, and expire date. If a start date is set, the file/folder will not display until after the specified date. If an expire date is set, it will not display after the date. To set the date, simply click on the calendar icon to the right of the box, or enter the date in a mm/dd/yyyy format.

Below that, there is a checkbox to display, or not display this file/folder. If this is not clicked, any date settings will be ignored, and the file will not display. If set, the date ranges will take effect, or it will display immediately if the ranges are not set.

Below that, you can enter a description for this file/folder that will display when people hover over the top of the name. You can use any formatting, and it will take effect when they hover over it.

(Leave below blank to assign as a folder)

File	Copy to server	Remove from document
No information to display!		

Upload Local File:

 Browse...

(jpg, png, bmp, gif, doc, pdf, dxf, dwg, zip, ppt, exe)

Add Remote Link:

 Copy to server

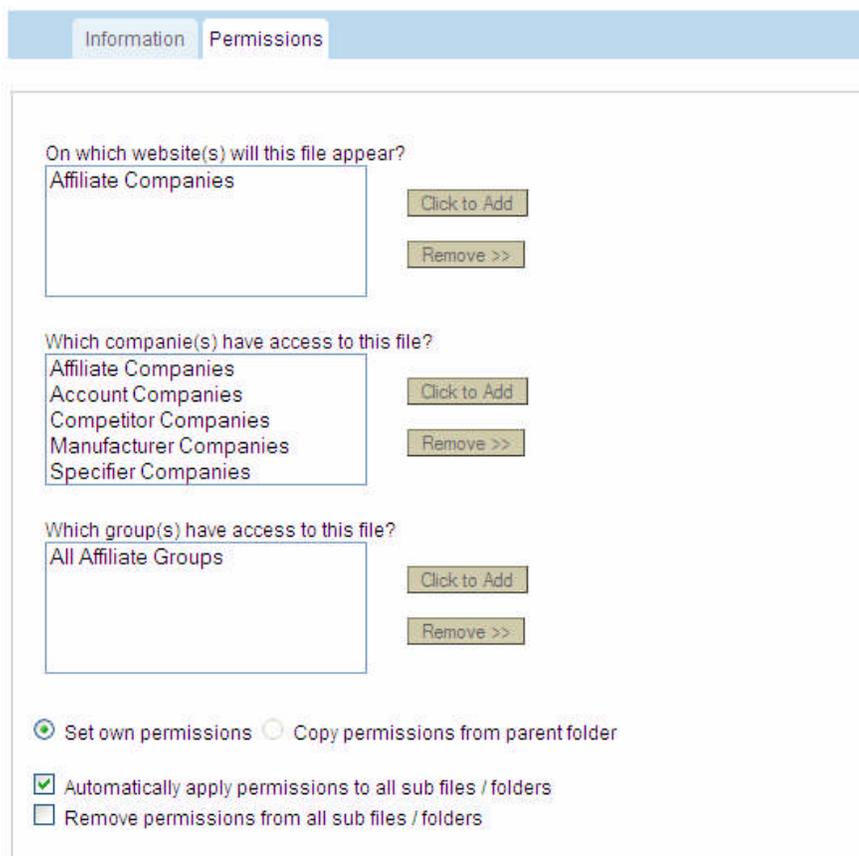
(jpg, png, bmp, gif, doc, pdf, dxf, dwg, zip, ppt, exe)

Below that, all file types that apply to this file are displayed. If it is empty, this will be automatically assigned as a folder. As soon as you add files, it loses its status as a folder, and becomes a file. To add a new file, click on "Browse", and find the file. You also have the option to add a file stored on a remote server (manufacturer's website, for example). To add a remote file, go to their website, find the file, copy the link in the navigation bar (the place where you enter things like http://www.google.com) of your browser (eg Internet Explorer), and paste it in the spot on our website where it says "Add Remote Link". Make sure you are linking to the file, not just the page (valid example: http://www.rainbird.com/pdf/turf/ts_1800series.pdf), meaning the last part of the link should contain "jpg, png, bmp, etc", just as uploading a file from your computer. If you wish to also copy the file from their website, and store it on our server, click on "Copy to server". This will add 2 files in the file section (where it currently says "No information to display!", in the screenshot above). One thing to note, it will be much slower to access a remote link than 1 stored on the server.

(Leave below blank to assign as a folder)

File	Copy to server	Remove from document
download_files.pdf	<input type="checkbox"/>	<input type="checkbox"/> 

After adding a file, there will be some options listed to the right of the file. The first option is “Copy to Server”. This is for adding a copy of a remote file on our server. If this option is greyed out (as above), it means it is not a remote file. The second option is “Remove from document”. This means you only want to make it so this file is no longer displayed, here. It WILL NOT delete the file off the server. This is useful if you have the file in more than 1 folder, but only want to remove it from this folder. To physically delete the file off the server, click on the garbage can all the way on the right.



When you click on the “Permission” tab, you will see a screenshot resembling the screenshot to the left. This is where you will specify which website(s) this file/folder will display on, which company(s) will have access to view/download this folder/file, and which group(s) within those company(s) have access to view/download this folder/fole. To add/remove this information, click on the “Click to Add” button to the right.

Below that, you will see “Set own permissions”, and “Copy permissions from parent folder”. If “Copy permissions from parent folder” is greyed out, as it is below, it means you are in the topmost folder, and there is no parent from which to copy permissions.

Below that, you will see 2 checkboxes, 1 that says “Automatically apply permissions to all sub files/folders”, and another that says “Remove permissions from all the sub files/folders”. If the first is checked, any permissions you set to this folder will apply automatically to everything below it (the “Permission” tab will not be accessible in those files/folders). The second, will automatically remove permissions. Be sure “apply permissions” is not checked if you wish to completely remove permissions from sub files/folders, or it will override the removal, and reapply the same permissions you set for this folder.

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This concludes the tutorial on adding new files/folders to the downloads sections. Downloads also directly tie into the ability to create submittals, but that is part of another tutorial at another time. Let me know if you have any questions!