Onboarding Files System Guideline

Introduction

This guide provides comprehensive instructions for using the Onboarding Files System, a web-based platform for file management and user access control.

Getting Started

Login

1. Access the application through your web browser.
2. Enter your username and password.
3. Click the "Login" button.

> **Note:** If you don't have an account, contact your administrator to create one.

Dashboard Interface

The dashboard consists of two main sections:

1. **Left Panel (User Panel):** Contains user profiles and navigation options.
2. **Main Content Area:** Displays files, actions, and user management options.

Common Buttons and Their Functions

Add Files | Upload Files | Assign Files | Delete Files

Button	Function	Required Permissions	Common Usage
Add Files	Opens modal to select existing files for assignment	Admin	When assigning files to multiple users

Upload Files	Uploads new files to the system	All users	When adding new documents to the system
Assign Files	Assigns selected files to specific users	Admin	When distributing documents to team members
Delete Files	Removes files from the system	Admin	When cleaning up old or unused files

Admin Role Features

User Management

> Admins have full control over user profiles and file access.

- View all user profiles in the system.
- Manage user access to files.
- Monitor file status (viewed/not-viewed).
- Edit user permissions and roles.

Common Admin Tasks

Edit User | Assign Files | Manage Permissions

Task	Steps	Potential Issues	Troubleshooting
Edit User Profile	1. Select user from left panel 2. Click "Edit" button 3. Update profile information 4. Save changes	• Permission errors • Missing required fields	• Check admin permissions • Verify all required fields

Assign Files	1. Select files to assign 2. Choose target users 3. Set initial status 4. Complete assignment	• File size limits • Invalid file types	• Check file size restrictions • Verify supported file formats

File Management

- Upload new files to the system.
- Assign files to specific users.
- View and manage all uploaded files.
- Delete files from the system.
- Monitor file access statistics.

File Upload Best Practices

> When uploading files:
>
> - Use descriptive filenames
> - Organize files by category
> - Monitor file size limits
> - Verify file formats

File Assignment

1. Click on the "Assign Files" button.
2. Select files from existing uploads or upload new files.
3. Choose users to assign the files to.
4. Set initial file status (not-viewed).
5. Click "Assign" to complete the process.

Important: When deleting files, ensure they are not currently in use by other users.

User Role Features

Profile Management

- View and edit personal profile information.
- Update contact details.
- Change password.
- View access history.

Common User Tasks

Edit Profile | View Files | Mark as Viewed

Task	Steps	Potential Issues	Troubleshooting
Edit Profile	1. Click "Edit Profile" 2. Update information 3. Save changes	• Missing required fields • Invalid email format	• Fill all required fields • Verify email format
View Files	1. Access file list 2. Filter by status 3. Download files	• Access denied • File not found	• Contact admin for access • Verify file permissions

File Access

- View files assigned to you.
- Mark files as viewed/not-viewed.
- Download assigned files.
- Track access history.

File Status

Files will show their status as either:

- **Not Viewed:** Files that haven't been accessed yet.
- **Viewed:** Files that have been accessed.

> File status automatically updates when you open a file.

Common Issues and Solutions

Issue	Solution
Cannot access file	Contact admin to check permissions
File not showing up	Refresh page or contact admin
File download fails	Check internet connection or try again

System Features

File Upload

> File upload supports multiple files and drag-and-drop functionality.

1. Click the "Upload Files" button.
2. Select files from your computer.
3. Drag and drop files into the designated area.
4. Click "Upload" to complete the process.

File Upload Restrictions

Important file upload limitations:

- Maximum file size: 100MB per file
- Supported formats: PDF, DOCX, XLSX, TXT, JPG, PNG
- Maximum uploads: 10 files per session

File Search

Use the search bar to:

- Search for files by name.
- Filter files by status.
- View file details (size, upload date).
- Sort files by date or name.

File Actions

- View file details.
- Download files.
- Delete files (Admin only).
- Assign files to users (Admin only).
- Mark files as viewed/not-viewed.

File Management Best Practices

```
1. Use descriptive filenames
2. Organize files by category
3. Regularly clean up unused files
4. Maintain consistent naming conventions
5. Document file purposes
```

Best Practices

Security

- Keep your login credentials secure.
- Log out when using a shared computer.
- Regularly update your password.

File Management

- Organize files with meaningful names.

- Regularly clean up unused files.
- Use the search feature for quick access.

Troubleshooting

Common Issues

- **Cannot access files:** Contact your administrator to check permissions.
- **Upload issues:** Ensure files are in supported formats and not too large.
- **Login problems:** Reset password through the "Forgot Password" link.