

File Xplorer User Guide

This user-guide provides a walkthrough of all the features our application has to offer. This document provides a step-by-step guide for each use case for each user level wherever applicable.

User access for each action:

This table shows the actions each user can perform in the application based on their roles.

User Role	Access Admin Actions	Upload Files	Delete Files	Replace Files	Archive Files	Download Files	Edit Topics	Add Files
Super Admin	✓	✓	✓	✓	✓	✓	✓	✓
Admin	✗	✓	✓	✓	✓	✓	✓	✓
Manager	✗	✓	✗	✓	✓	✓	✓	✓
Base	✗	✓	✗	✓	✓	✓	✓	✓

Sign-in:

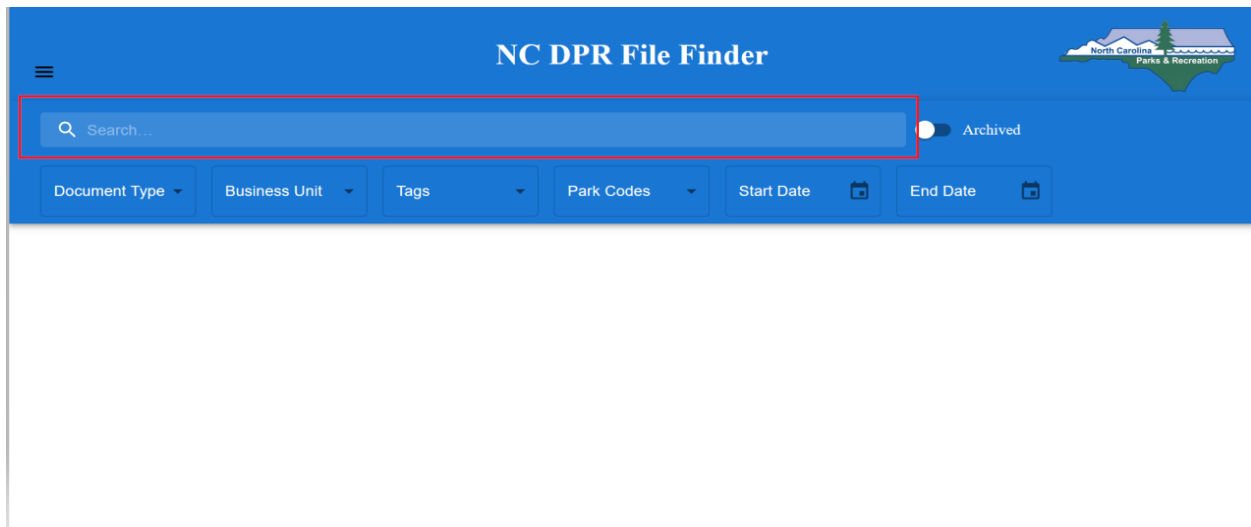
Users will be taken to the sign in page before accessing the application. Upon entering valid credentials the application will authenticate the user and will take them to the application's landing page (search page).



The image shows the sign-in page for the NC DPR File Finder application. It features a blue header with the title "NC DPR File Finder" and the North Carolina Parks & Recreation logo. Below the header, there are two input fields: "Username:" and "Password:". A blue "Submit" button is positioned below the password field.

Common use cases for all users:

After a user is authenticated they are redirected to the application's search page. Here the user can search for files and topics.



The image shows the search landing page for the NC DPR File Finder application. It features a blue header with the title "NC DPR File Finder" and the North Carolina Parks & Recreation logo. Below the header, there is a search bar with a magnifying glass icon and the text "Search...". To the right of the search bar is a toggle switch labeled "Archived". Below the search bar, there are several filter buttons: "Document Type", "Business Unit", "Tags", "Park Codes", "Start Date", and "End Date". Each button has a dropdown arrow. The main content area is a large white rectangle.

Figure 1 Search landing page

To **execute a search**, the user needs to click on the search text box (highlighted in red in Figure 1) and press the enter key on the keyboard.

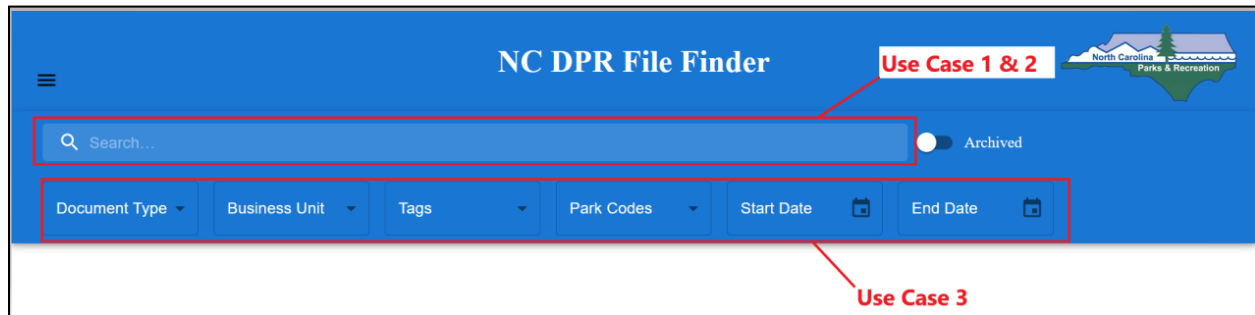


Figure 2

UC1 View List Of All Topics:

A user can view all the topics in the system via an empty search.

Steps:

1. Once on the search page, make sure that no filters are selected and that the text box is empty
2. Press the **Enter** button on the keyboard.

A list of all the topics in the system should be shown as in *Figure 3*.

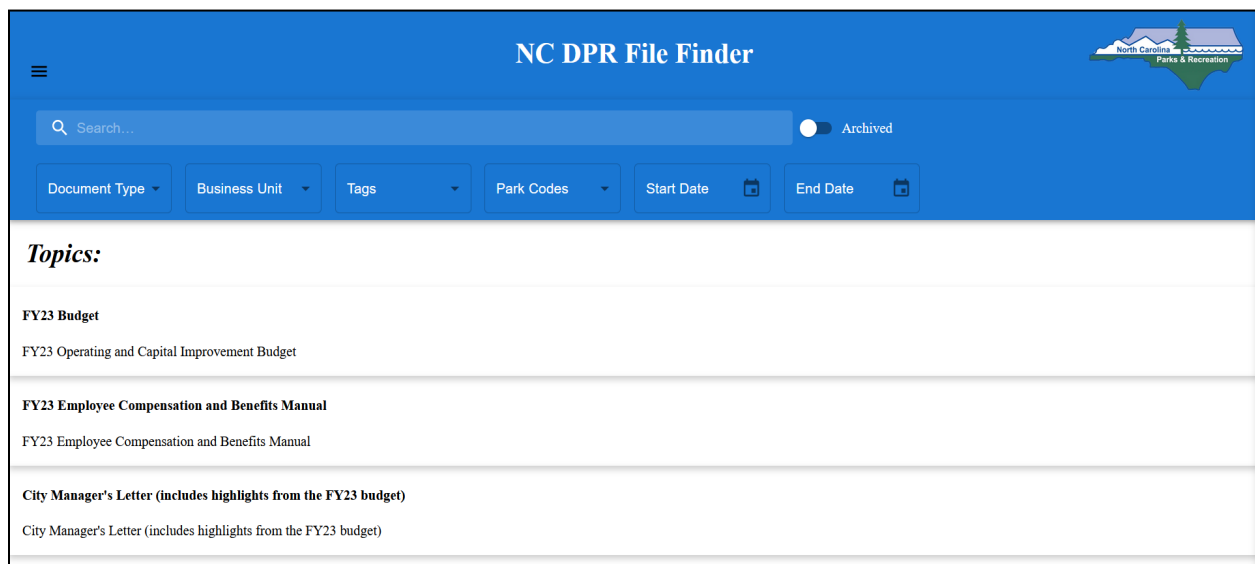


Figure 3 UC1 View All Topics

UC2 Search Via Keyword:

A user can search for a file or a topic in the system using keywords.

Steps:

1. In the **search box** enter the keyword(s) that you want to search for.
2. Press the **Enter** button on the keyboard to execute search.

If the system has topics or files that match the input keywords, it shall present a list of files and topics as shown in *Figure 4*

The screenshot displays the 'NC DPR File Finder' web application. At the top, there is a blue header with the title 'NC DPR File Finder' and a logo for 'Parks & Recreation' on the right. Below the header is a search bar containing the text 'budget' and a toggle switch for 'Archived'. Under the search bar are several filter buttons: 'Document Type', 'Business Unit', 'Tags', 'Park Codes', 'Start Date', and 'End Date'. The main content area is divided into two sections: 'Topics:' and 'Files:'. The 'Topics:' section lists two items: 'FY23 Budget' with a sub-description 'FY23 Operating and Capital Improvement Budget', and 'City Manager's Letter (includes highlights from the FY23 budget)' with a sub-description 'City Manager's Letter (includes highlights from the FY23 budget)'. The 'Files:' section lists two PDF files: 'FY23 Budget.pdf' and 'fy23-manager-budget-message.pdf'. Each file entry includes a 'Download File' button and a row of filters: 'Document Type: General', 'Business Unit: Accounting/Budget', 'Tags', and 'Park Codes'.

Figure 4 UC2 Results for a search via keyword.

UC3 Search with Filters

A user shall be able to search for files that match the selected filters

Steps:

1. Select any combination of filters from the options below the search bar (Document Type, Business Unit, Tags, Park Codes, Start & End Dates)
2. Press the **Enter** button on the keyboard to execute search.

If the system has files that match the user's selected filter options, it shall present a list of files as shown in *Figure 5*.

The screenshot displays the 'NC DPR File Finder' web application. The header is blue with the title 'NC DPR File Finder' and a logo for 'North Carolina Parks & Recreation'. Below the header is a search bar with a magnifying glass icon and the text 'Search...'. To the right of the search bar is a toggle switch labeled 'Archived'. Below the search bar are several filter buttons: 'Document Type' (set to 'General'), 'Business Unit' (set to 'Accounting/Budget'), 'Tags' (set to 'Budget'), 'Park Codes', 'Start Date', and 'End Date'. Below the filters, the word 'Files:' is displayed. A single file is listed: 'FY23 Budget.pdf'. To the right of the file name is a 'Download File' button. Below the file name, the filters are repeated: 'Document Type: General', 'Business Unit: Accounting/Budget', 'Tags', and 'Park Codes'.

Figure 5 UC3 Result for a search via filter options

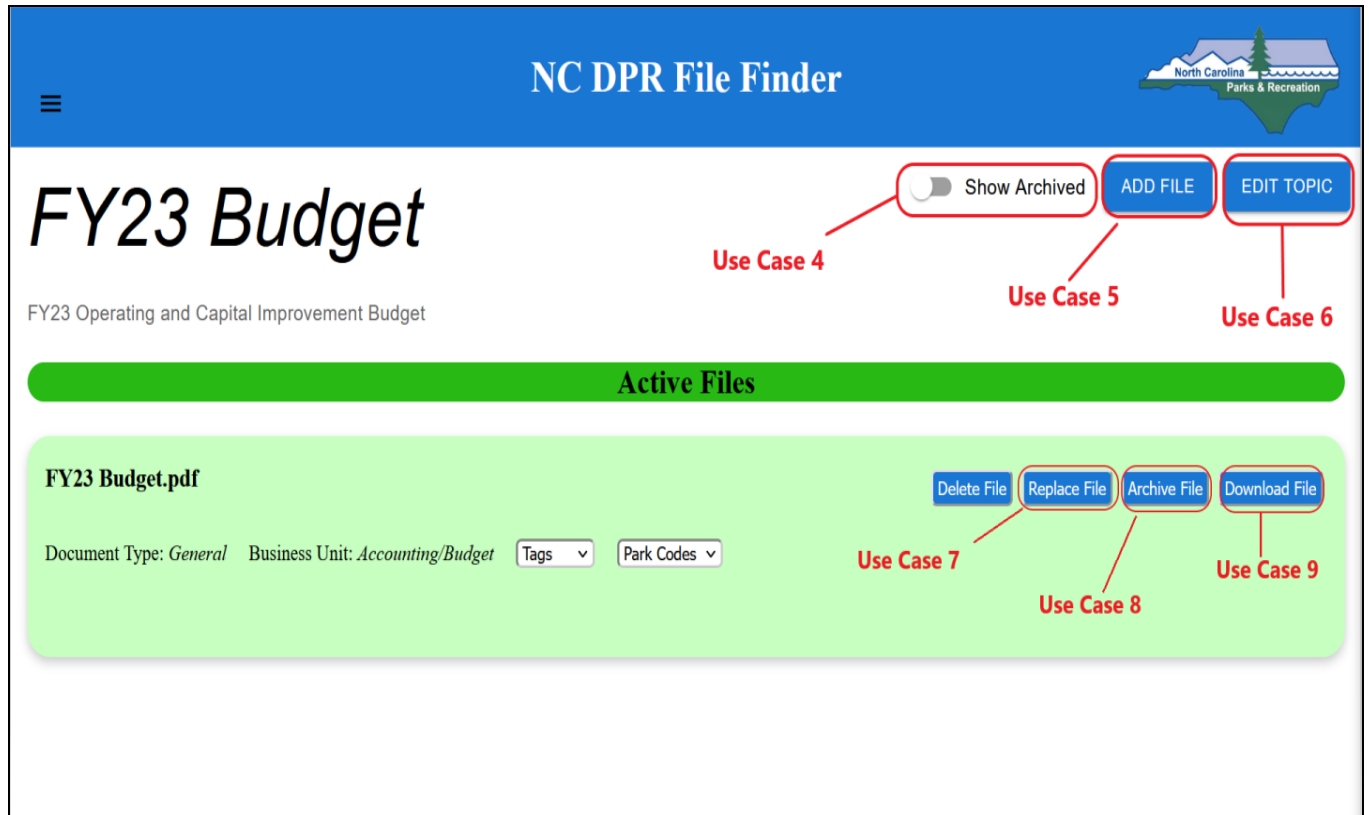


Figure 6

The **Topic view** page is shown when the user clicks on one of the topic results shown on the search page.

UC4 View archived files:

A user can view all archived files that belong to the Topic in view

Steps:

1. Once on the topic view page click on the **Show Archive** toggle button.

A list of archived files is displayed beneath the Active Files listing (*Figure 7*).

The screenshot shows the 'NC DPR File Finder' interface. At the top, there is a blue header with the title 'NC DPR File Finder' and a logo for 'North Carolina Department of Parks & Recreation'. Below the header, the main content area is titled 'FY23 Budget' with a subtitle 'FY23 Operating and Capital Improvement Budget'. To the right of the title, there is a toggle switch for 'Show Archived' and two buttons: 'ADD FILE' and 'EDIT TOPIC'. The interface is divided into two main sections: 'Active Files' and 'Archived Files'. The 'Active Files' section is highlighted in green and contains a file named 'FY23 Budget.pdf'. Below the file name, there are fields for 'Document Type: General', 'Business Unit: Accounting/Budget', and two dropdown menus for 'Tags' and 'Park Codes'. To the right of the file name, there are four buttons: 'Delete File', 'Replace File', 'Archive File', and 'Download File'. The 'Archived Files' section is highlighted in orange and contains a file named '2022 Budget.jpg'. Below the file name, there are fields for 'Document Type: General' and 'Business Unit: Accounting/Budget'. To the right of the file name, there are three buttons: 'Delete File', 'Unarchive File', and 'Download File'.

Figure 7 UC4 View Archived Files.

UC5 Add File To Existing Topic:

A user can add new files to an existing Topic.

Steps:

1. On the topic view page for an existing topic, click on the **Add File** Button.
2. Drag & Drop or upload file from local system to the Upload File popup, and select desired attributes
3. Click **Save**.

The file is uploaded to the system and is visible on the same topic view page (*Figure 8*)

NC DPR File Finder

FY23 Budget

FY23 Operating and Capital Improvement Budget

Show Archived ADD FILE EDIT TOPIC

Active Files

FY23 Budget Form.pdf

Document Type: *Staff Directives/Guidelines* Business Unit: *Other* Tags

Delete File Replace File Archive File Download File

FY23 Budget.pdf

Document Type: *General* Business Unit: *Accounting/Budget* Tags Park Codes

Delete File Replace File Archive File Download File

Archived Files

2022 Budget.jpg

Document Type: *General* Business Unit: *Accounting/Budget*

Delete File Unarchive File Download File

Figure 8 UC5 View after adding a form document to the current topic.

UC6 Edit Topic Metadata:

A user should be able to edit a topic's title and description.

Steps:

1. Click on the **Edit Topic** button on the topic view page for an existing topic.
2. Update the topic's title or description via the given text boxes for each section.
3. Click on the **Save** button.

After clicking on the save button the user is redirected back to the topic view page. The topic view should reflect the updated topic title and or description as changed by the user. *Figure 9* shows the topic view page after the title and description is updated compared to *Figure 8*.

The screenshot displays the 'NC DPR File Finder' interface. At the top, there is a blue header with a menu icon, the title 'NC DPR File Finder', and the North Carolina Parks & Recreation logo. Below the header, the main title 'FY23 Budget Updated' is prominently displayed. To the right of the title, there is a toggle switch for 'Show Archived' and two buttons: 'ADD FILE' and 'EDIT TOPIC'. Underneath the title, a subtitle reads 'FY23 Operating and Capital Improvement Budget Updated'. A green bar labeled 'Active Files' separates the header from the file list. The file list contains two entries, each in a light green box. The first entry is 'FY23 Budget.pdf', with document type 'General', business unit 'Accounting/Budget', and dropdown menus for 'Tags' and 'Park Codes'. The second entry is 'FY23 Budget Form.pdf', with document type 'Staff Directives/Guidelines', business unit 'Other', and a 'Tags' dropdown menu. Each file entry has four action buttons: 'Delete File', 'Replace File', 'Archive File', and 'Download File'.

Figure 9 UC6 Topic view after editing its title and description.

UC7 Replace File In a Topic:

A user should be able to replace a file under an existing topic from its topic view

Steps:

1. On the topic view for an existing topic, click on the **Replace File** button on the file that needs to be replaced
2. Drag & Drop or upload file from local system to the Upload File popup, and select desired attributes
3. Click on the **Save** button.

After clicking on the save button the user is redirected back to the topic view page. In the Active Files section of the topic view, the newly uploaded file should be visible. The file that was replaced is now archived and can be seen via the Show Archived toggle button. *Figure 10* shows the updated FY23 Budget file is now replaced by the FY23 Budget Updated file.

The screenshot displays the 'NC DPR File Finder' interface for the topic 'FY23 Budget Updated'. The header bar is blue with the title 'FY23 Budget Updated' and a 'Show Archived' toggle. Below the header, the 'Active Files' section is highlighted in green and contains two file entries. The first entry is 'FY23 Budget Updated.pdf' with a 'Replace File' button and a 'Download File' button. The second entry is 'FY23 Budget Form.pdf' with a 'Replace File' button and a 'Download File' button. The 'Archived Files' section is highlighted in orange and contains one file entry: 'FY23 Budget.pdf' with a 'Replace File' button and a 'Download File' button. Each file entry also includes a 'Delete File' button and a 'Tags' dropdown menu.

Figure 10 UC7 Topic view after replacing a file.

UC8 Archive a File:

A user should be able to archive a file from the current topic they are looking at. Archiving a file removes it from any future search results unless archived files are being explicitly included in the search result by toggling the “archive” filter.

Steps:

1. Click on the **Archive File** button on the file you want to archive.

The file disappears from the topic view.

2. To view the newly archived file, click on the Show Archive toggle button.

The archived file can be seen on the topic view. Figure 11 shows the updated Archived File section after archiving the FY23 Budget Form file.

The screenshot displays the NC DPR File Finder interface for the topic 'FY23 Budget Updated'. The interface is divided into two main sections: 'Active Files' and 'Archived Files'. The 'Active Files' section, highlighted in green, contains one file: 'FY23 Budget Updated.pdf'. The 'Archived Files' section, highlighted in orange, contains three files: 'FY23 Budget.pdf', '2022 Budget.jpg', and 'FY23 Budget Form.pdf'. The 'FY23 Budget Form.pdf' file is the one that was archived. The interface includes a 'Show Archived' toggle button in the top right corner, which is currently turned on. The 'FY23 Budget Form.pdf' file in the Archived Files section has a 'Delete File' button, an 'Unarchive File' button, and a 'Download File' button. The 'FY23 Budget Updated.pdf' file in the Active Files section also has a 'Delete File' button, a 'Replace File' button, an 'Archive File' button, and a 'Download File' button. The 'FY23 Budget Form.pdf' file has a 'Document Type' of 'Staff/Directives/Guidelines' and a 'Business Unit' of 'Other'. The 'FY23 Budget.pdf' file has a 'Document Type' of 'General' and a 'Business Unit' of 'Accounting/Budget'. The '2022 Budget.jpg' file has a 'Document Type' of 'General' and a 'Business Unit' of 'Accounting/Budget'.

Figure 11 UC8 Topic view after archiving a file from active files section.

UC9 Download A File From Topic View:

A user should be able to download a file from the topic view page.

Steps:

1. Click on the **Download File** button for the file you want to download.

The file should be downloaded to the system Downloads folder. Note that some file types may automatically open on the web browser and will require the user to download the file contents from there.

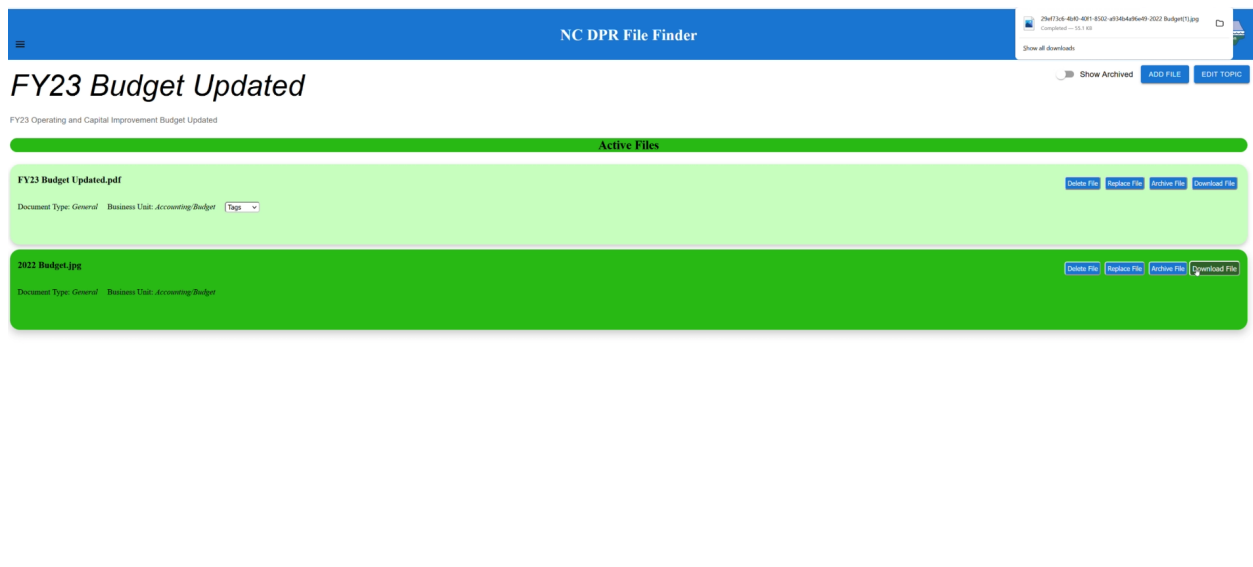


Figure 12 UC9 Download File.

UC10 Upload Files:

A user should be able to create new topics and upload new files under that topic. Note that a user can upload a maximum of five files at a time.

Steps:

1. On the Search page click on the hamburger menu on the top left of the page.
2. From the menu click on the **UPLOAD FILES** button.
3. On the upload file page, enter a value for topic title and optionally enter a value for topic description. Note that upload will fail if the topic title is not unique.
4. Click on the **Add Files** button.
5. Drag and drop or upload the file from your local system to the Upload File popup, and select the necessary file attributes.
6. Click **Save**.
7. Click **Upload Files**.

A new topic with the given files is created and a successful upload message is displayed as shown in Figure 13.

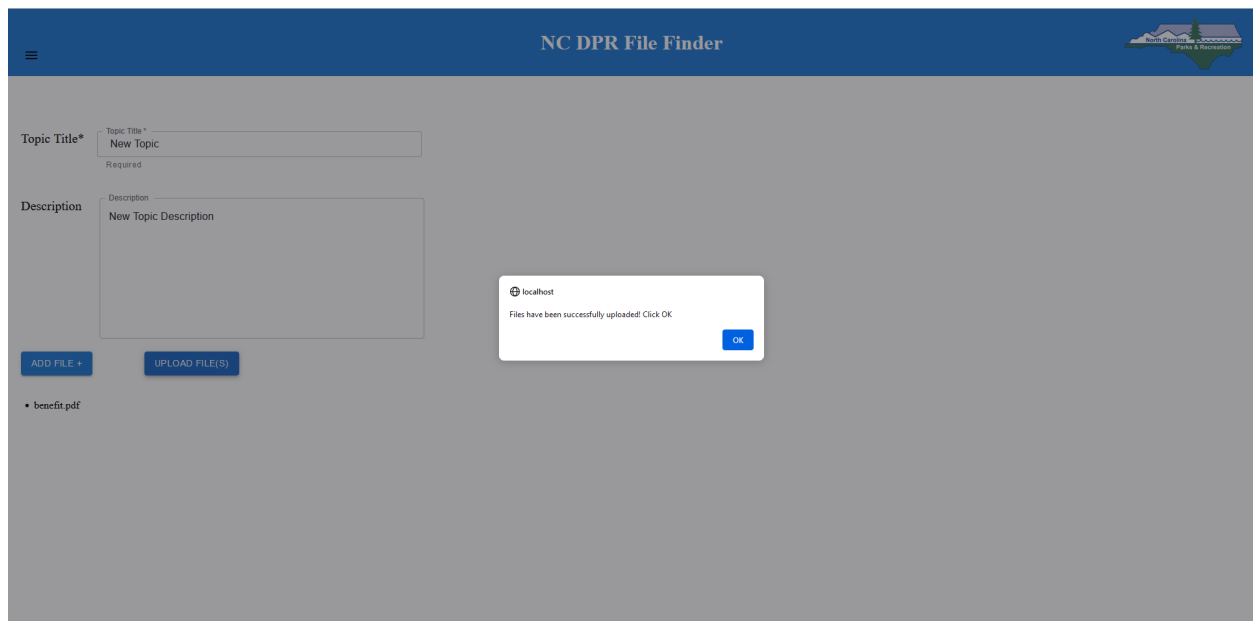


Figure 13 UC10 Upload Files

Use cases for Super Admin & Admin:

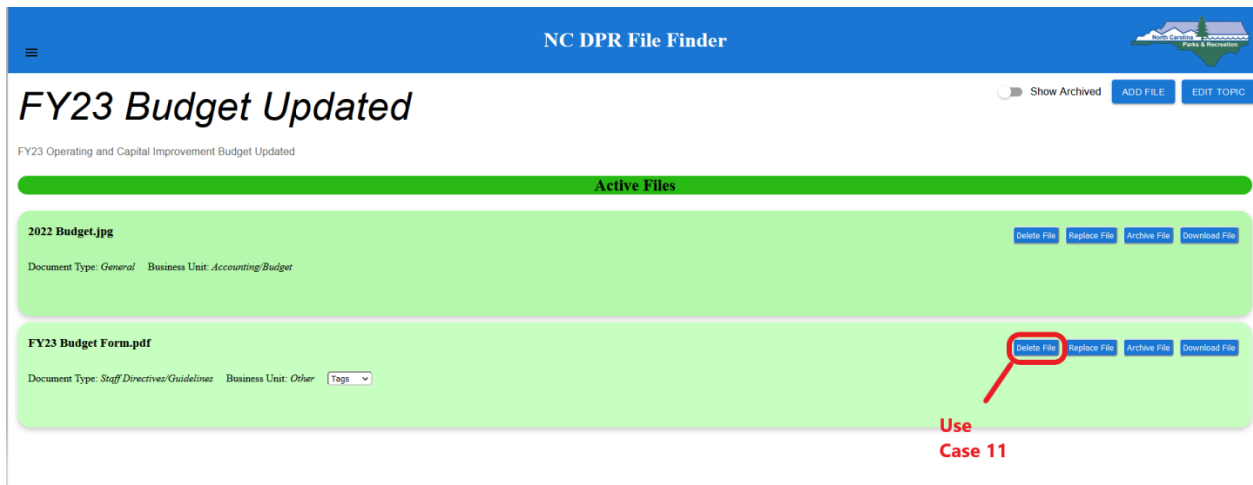


Figure 14

UC11 Delete Files:

An Admin and Super Admin should be able to delete a File from the system.

Steps:

1. Click on the **Delete File** button for the file you want to delete.

As shown in figure 15, the deleted file will disappear from the page.

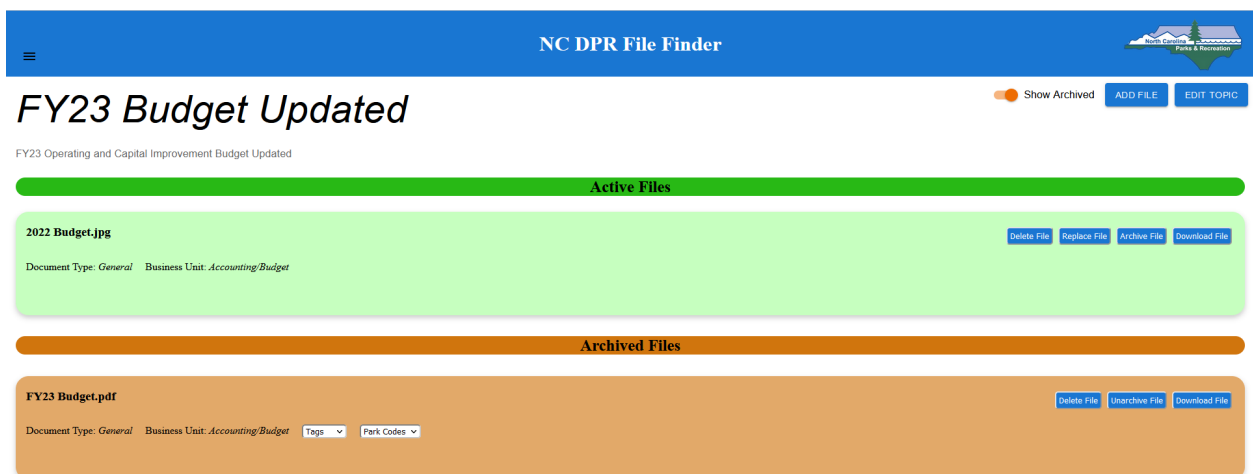


Figure 15 UC11 Delete Files

Use cases exclusive to a Super Admin:

A super admin user can access **ADMIN ACTIONS** from the hamburger menu as shown in figure 16.

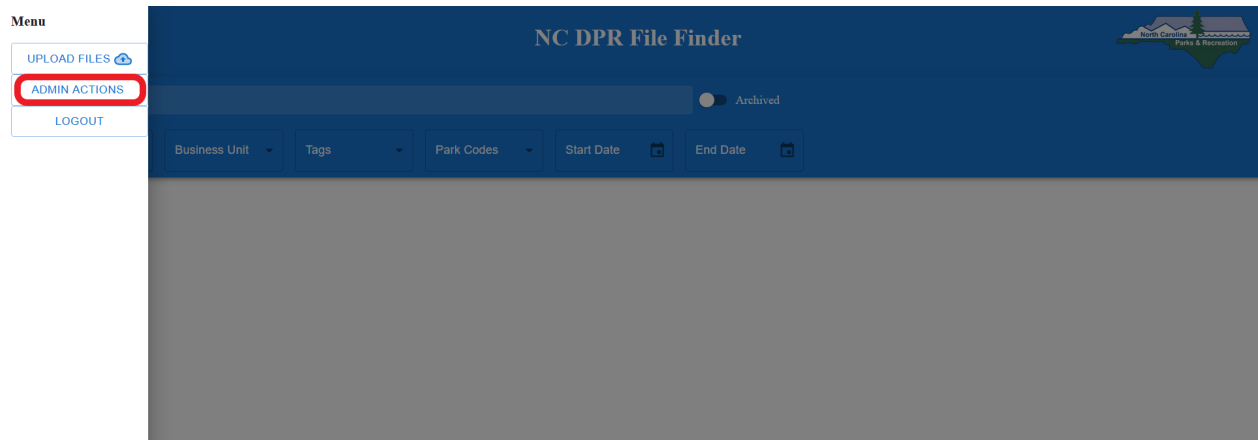


Figure 16

Figure 17 represents the landing page for Admin Actions. Dedicated tabs represent different file attributes the user can view/create/edit. For brevity, screenshots below show interactions on the Tag tab. Note that other file attributes work the same way.

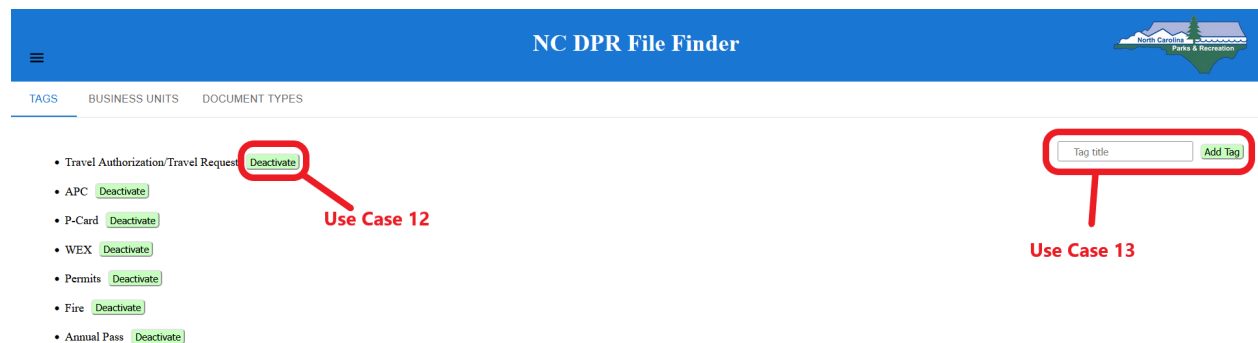


Figure 17

UC12 Activate/Deactivate File Attribute

A Super Admin should be able to activate or deactivate a file attribute. Deactivating a file attribute will remove it from the list of attributes offered on the file upload page. Note that the **Deactivate** button is shown when the file attribute is active, and the **Activate** button is shown when the file attribute is not active.

Steps:

1. Click on the **Deactivate** button next to the file attribute to deactivate that file attribute (Refer to Figure 17).

The file attribute will now display an “Activate” button, as shown in Figure 18, which means the attribute has been deactivated, and if you would like to activate it again click on the Activate button.

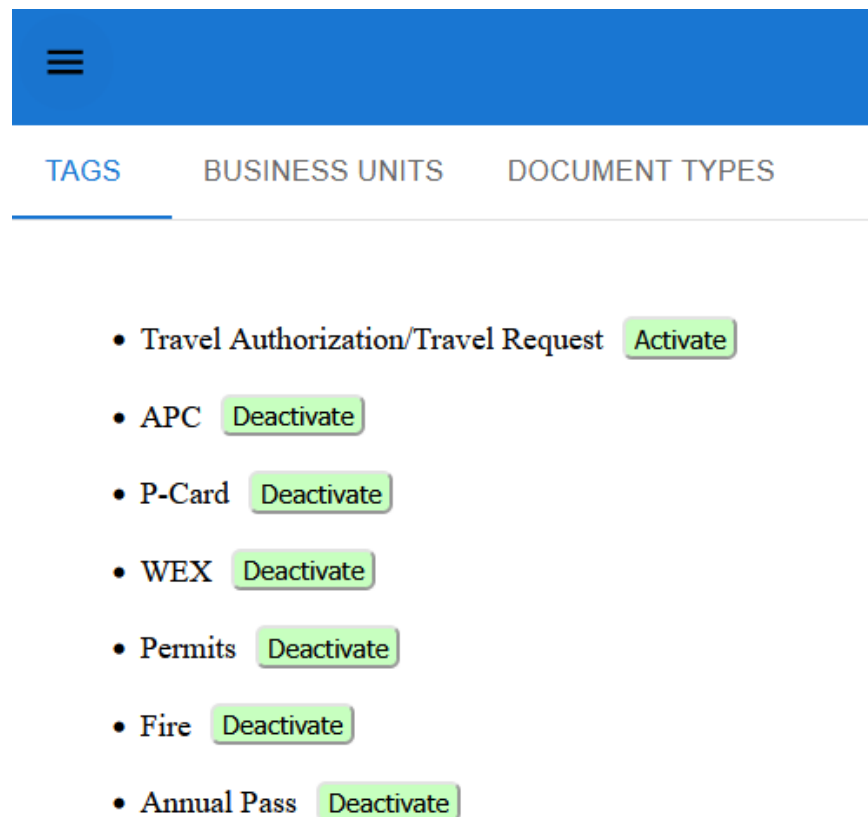


Figure 18 UC12 Activate/Deactivate File Attribute

UC13 Add New File Attribute

A Super-Admin should be able to add a new file attribute. There are three file attributes: tags, business units, and document types in this context.

Steps:

1. Enter the title for the new file attribute in the text box (Refer to Figure 17).
2. Click on **Add <File Attribute>** (in this case; button depends on the file attribute).

As shown in Figure 19, the new attribute is added at the bottom. By default, it is an active attribute, but you can deactivate it if desired as shown in UC12.

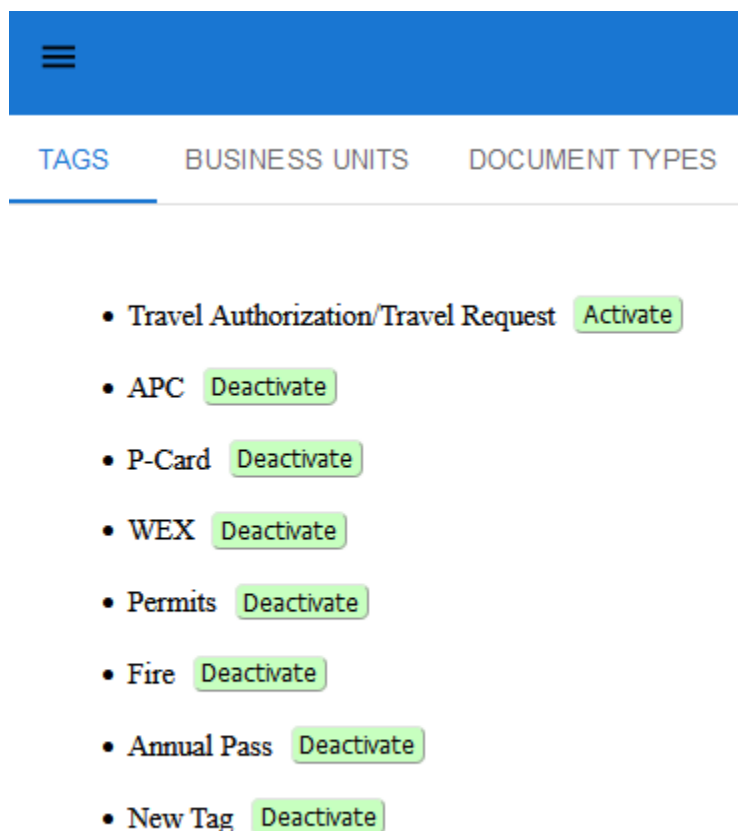


Figure 19 UC13 Add New File Attribute