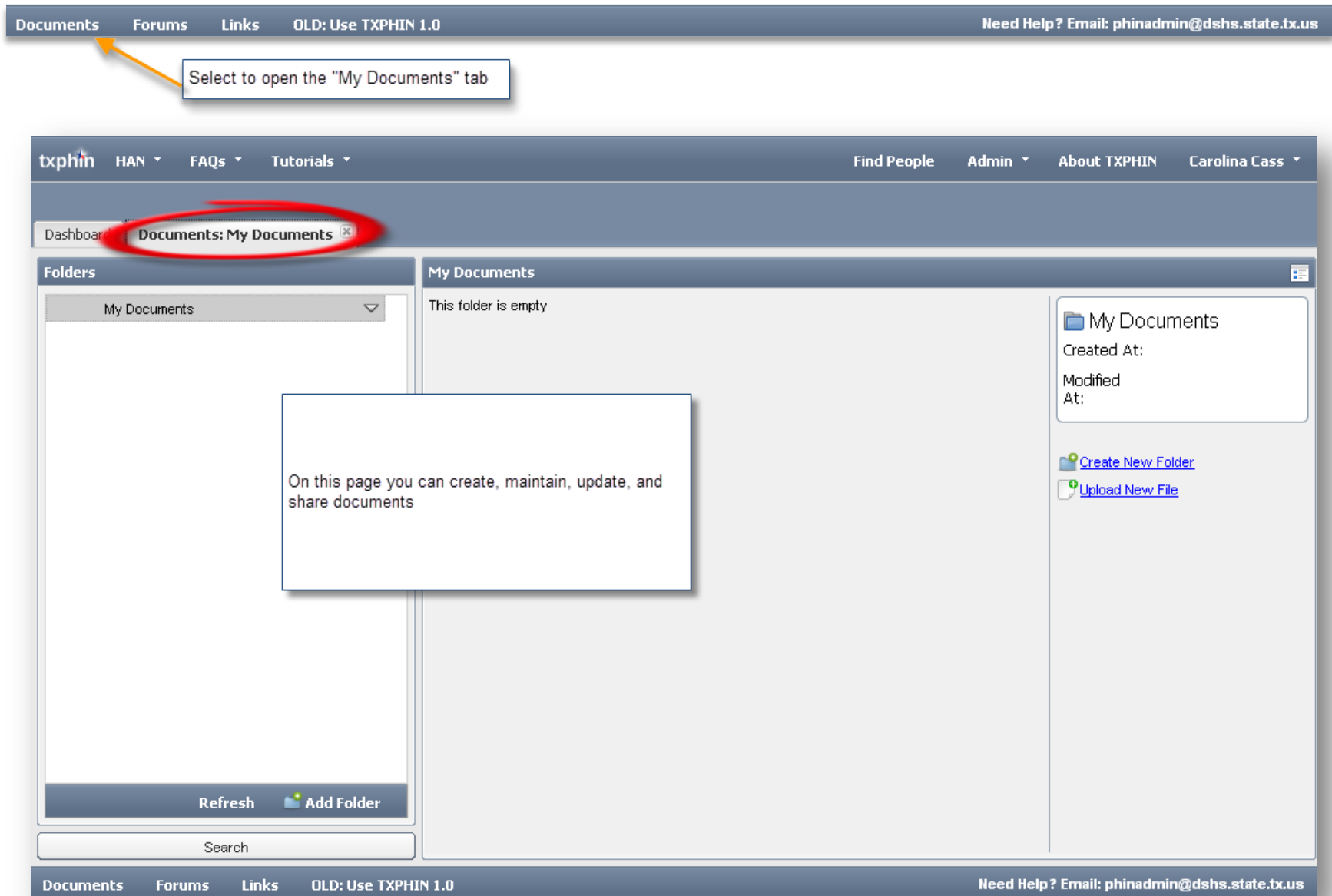# DOCUMENTS

Another feature of the PHIN is the ability users to create, update, and share documents. There is a toolbar at the bottom of the screen that has options such as "Documents," "Forums," and "Links". Click on documents and the "Documents: My Documents" tab will open.
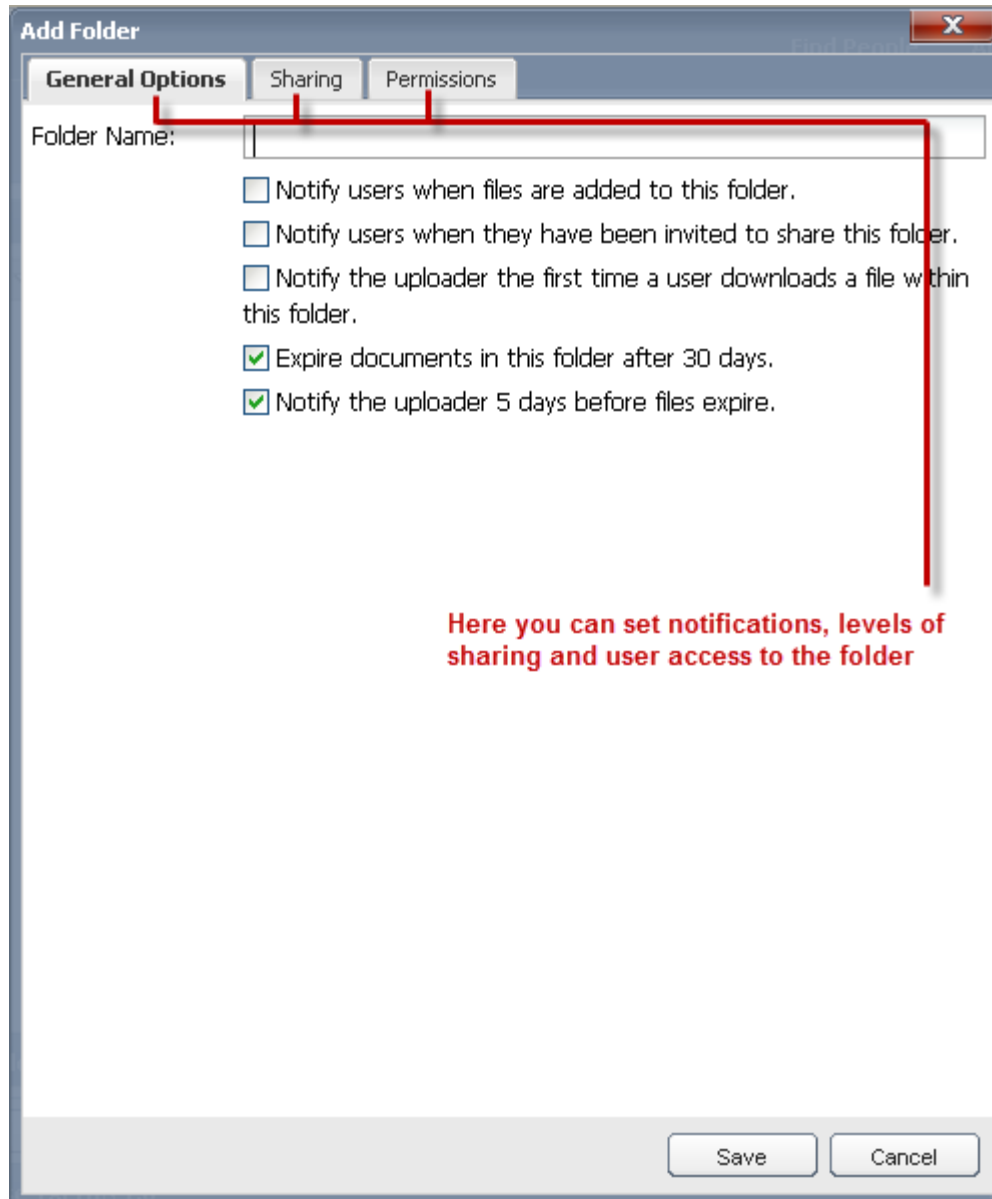
CREATING A NEW FOLDER

On this page you can search and view your folders and the documents within a given folder. We'll start with creating a folder. There are three ways to create a new folder; (1) Select "Create New Folder" at the far right of the page, (2) Select "Add Folder" the bottom of the first column, (3) Click the downward arrow on the "My Documents" bar and select "Add New Folder".
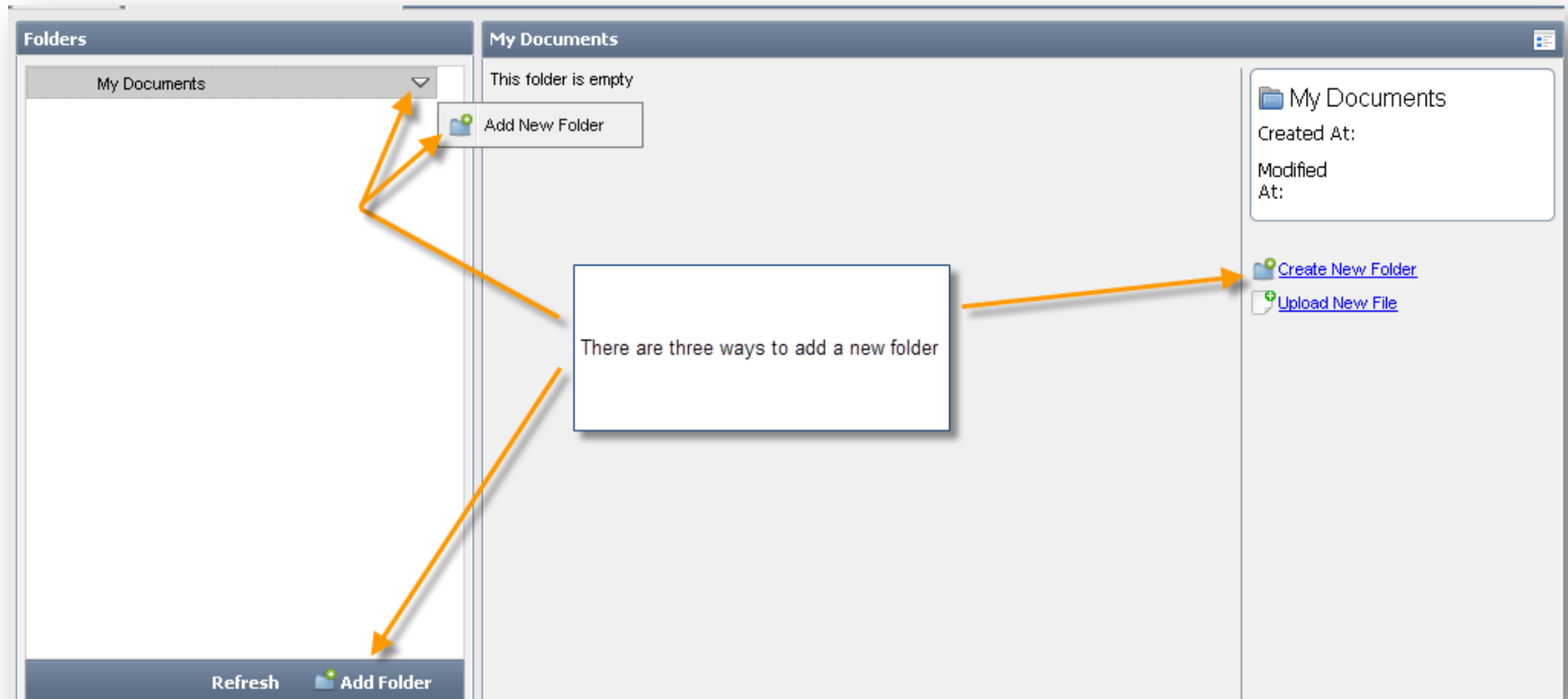
A screen will pop up allowing you to set the folder's general, shared, and permissions options along with naming the new folder.

Add Folder   X

General Options   Sharing   Permissions

Folder Name:

☐ Notify users when files are added to this folder.

☐ Notify users when they have been invited to share this folder.

☐ Notify the uploader the first time a user downloads a file within this folder.

☑ Expire documents in this folder after 30 days.

☑ Notify the uploader 5 days before files expire.

Here you can set notifications, levels of sharing and user access to the folder
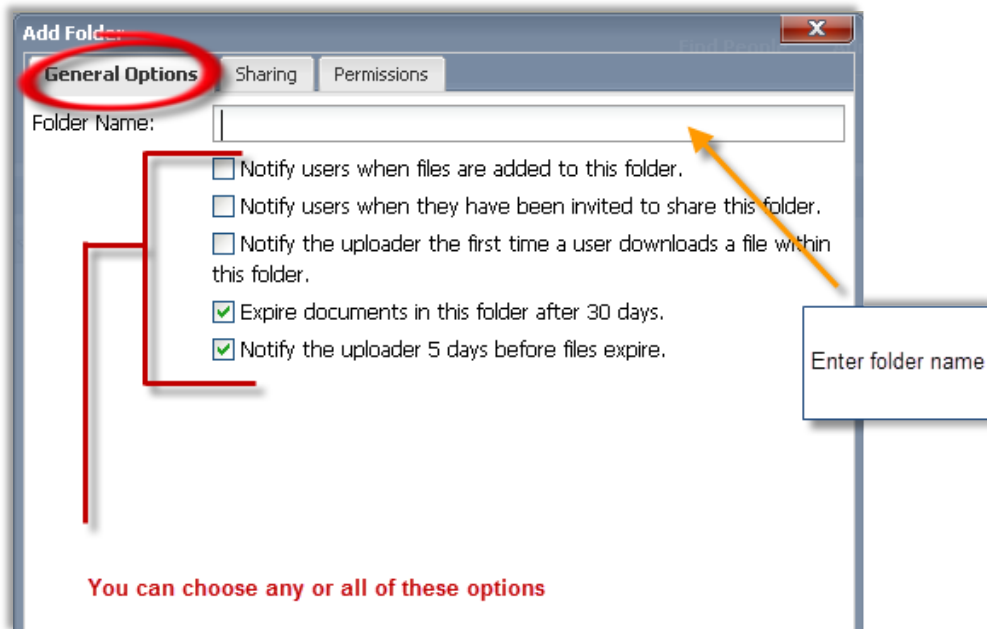
Save   Cancel

You can move back and forth between pages by clicking on the tabs.

GENERAL OPTIONS

Here you can choose to:

- Notify users when files are added to the folder.
- Notify users when they have been invited to share this folder.
- Notify the uploader the first time a user downloads a file within this folder.

You also can also set the documents within the folder to expire after 30 days and to notify users 5 days before the files expire.
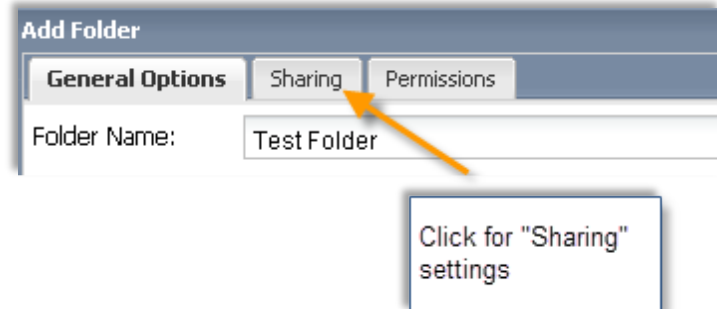

In order for these user notifications to be useful you need to choose the folder's "Sharing" settings.

SHARING

Here you can choose to share your folder and its files with others. You have the option to share as (1) Inherited (Uses same permissions as the parent folder), (2) Not Shared, Shared (with this option, you will need to select the users you wish to share with).
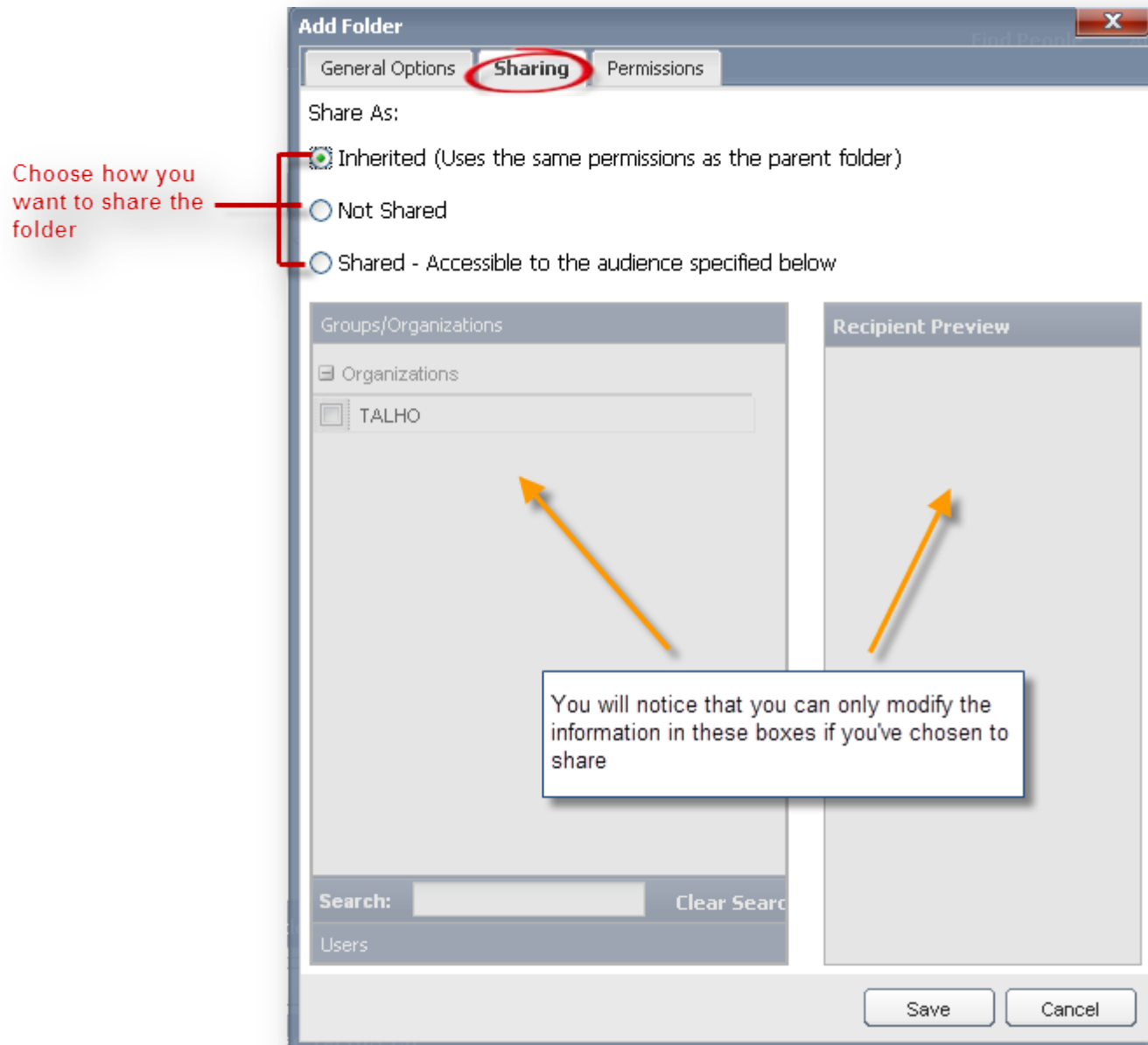
You can share with groups/organizations and or specific users. To select a group/organization, check the box to the left of the group you wish to add. You can also search for a specific group by using the "Search" bar below. To add multiple groups using the "Search" function, click "Clear Search" and enter in the next group name.
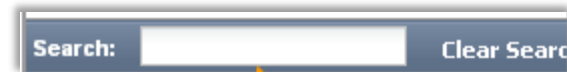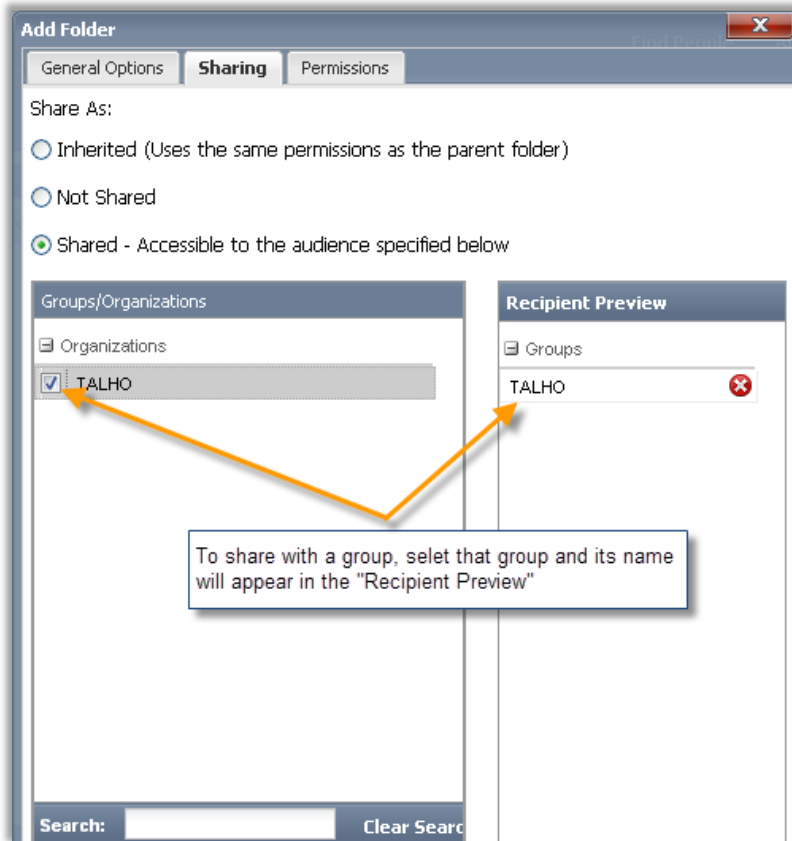
To share with individual users, open "Users" and type the name or email of the individual in the box provided at the bottom. When the name appears, select It and it will appear in the "Recipient Preview" to the right.

Groups/Organizations

☐ Organizations

☐ TALHO

Click "Users" to chose individual users

Search: [   ]   Clear Searc

Users

Groups/Organizations

Users

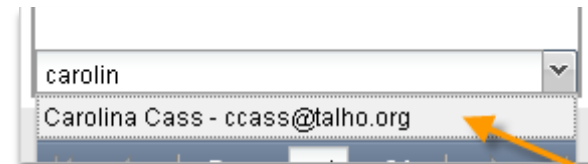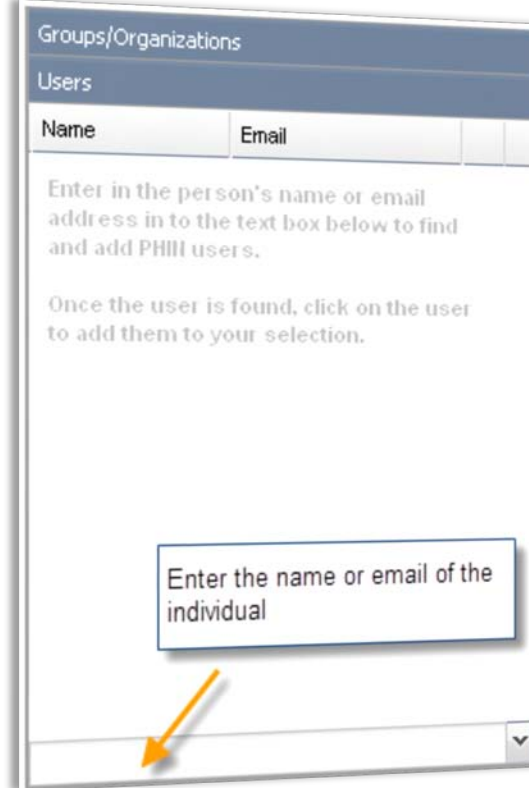| Name	Email

Enter in the person's name or email address in to the text box below to find and add PHIII users.

Once the user is found, click on the user to add them to your selection.

Enter the name or email of the individual

carolin

Carolina Cass - ccass@talho.org

Click the correct user when they appear

To delete a Group or User, click the red X to the right of their name in the "Recipients Preview."

Recipient Preview

☐ Users

| Carolina Cass | ⊗ |
| Ethan Waldo | ⊗ |

Click the red X to delete
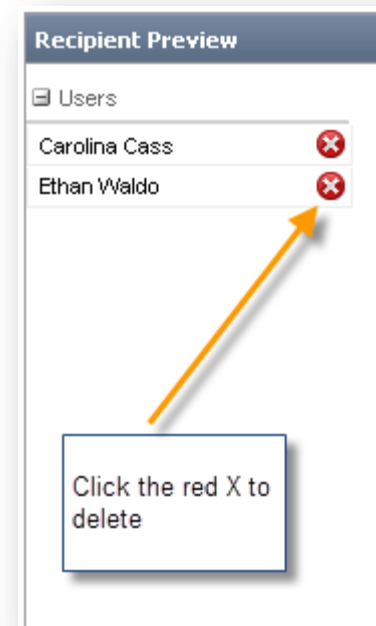
PERMISSIONS

If you choose to share your folder, you will need to set the permissions (level of access) for those individuals you will be sharing with.
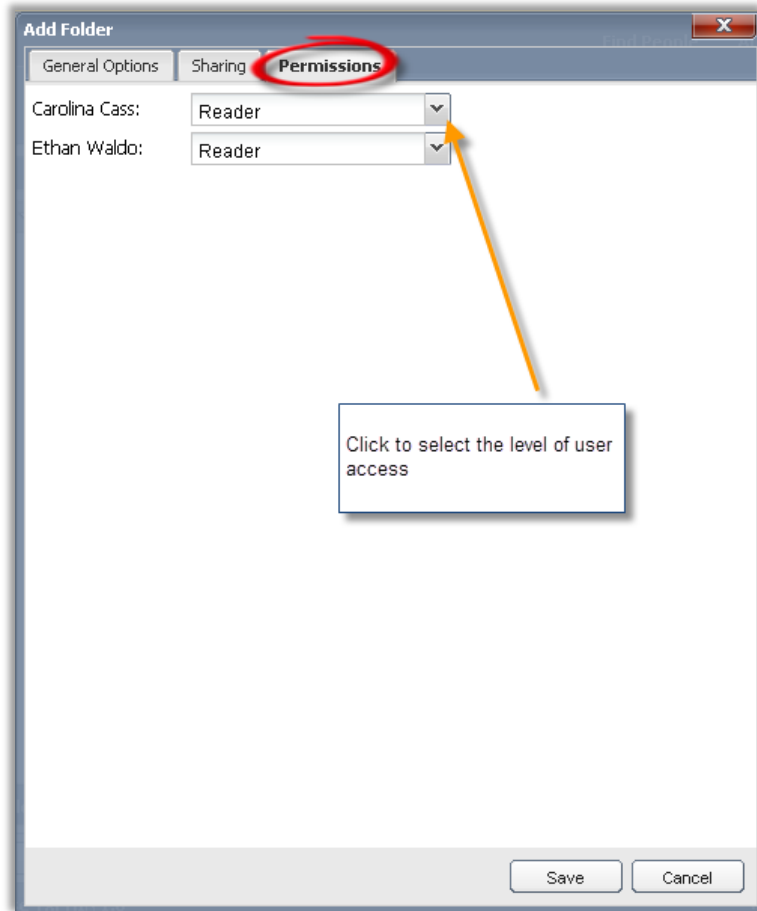
You can choose from (1) Reader, (2) Author, (3) Admin.
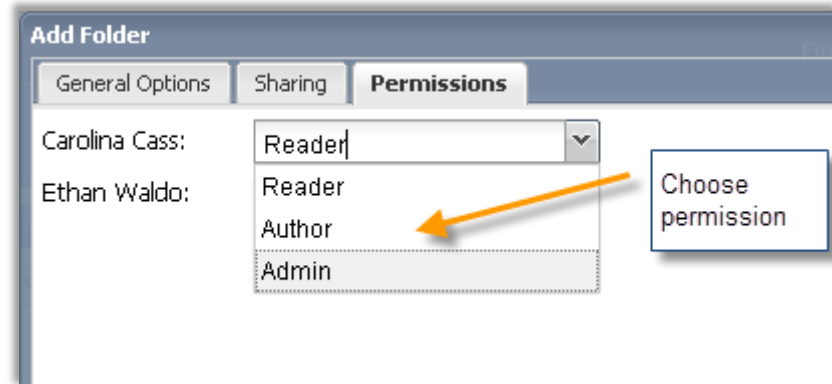
A "Reader" can only read the files in the folder. They cannot upload new files or edit existing ones.

An "Author" can upload and edit files.

An "Admin" has full access to the folder, they can upload, edit, delete and monitor.

When you are satisfied with your setting click save at the bottom right of the page. (This can be done in any of the tabs)
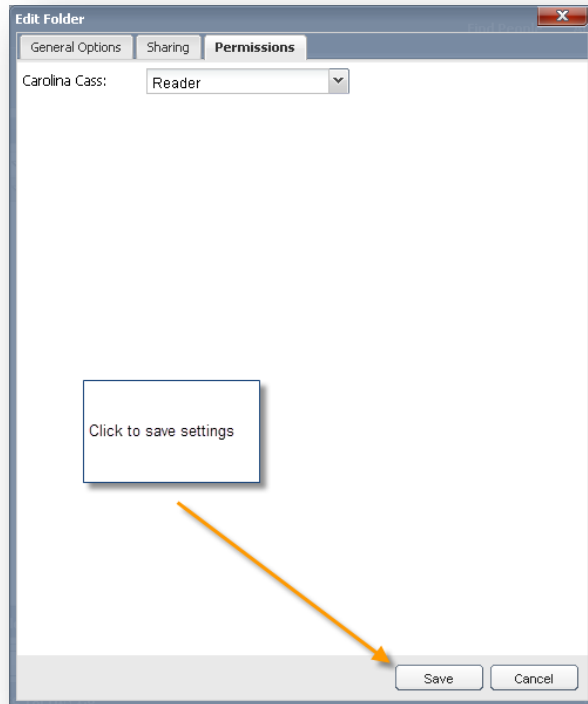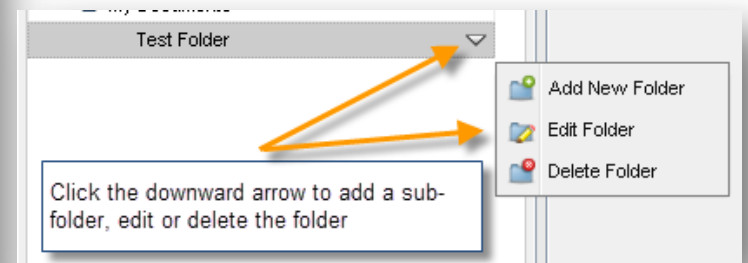
Edit Folder

General Options | Sharing | **Permissions**

Carolina Cass: Reader

Click to save settings

Save | Cancel

The folder will now appear in the "Folders' column of the "My Documents" page. From the downward arrow to the right of the folder name you can "Add New Folder", "Edit Folder" and/or "Delete Folder."

Dashboard | **Documents: Test Folder**

Folders

My Documents

Test Folder

The folder now appears in the "Folders" column

Refresh   Add Folder

Search

Test Folder

Add New Folder

Edit Folder

Delete Folder

Click the downward arrow to add a sub-folder, edit or delete the folder

UPLOADING FILES

To upload a file to the folder, click on the "Upload New File" found at the right-hand side of the page. From this column you can also create a new folder, edit, and move or delete folders. At the top of the column is box containing the folder name as well as the date and time when it was created and the date and time when it was last modified.
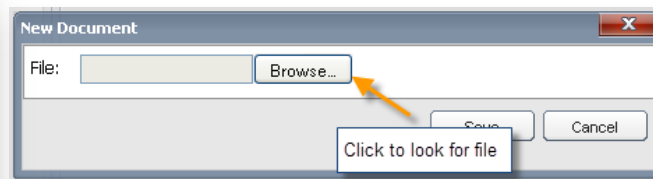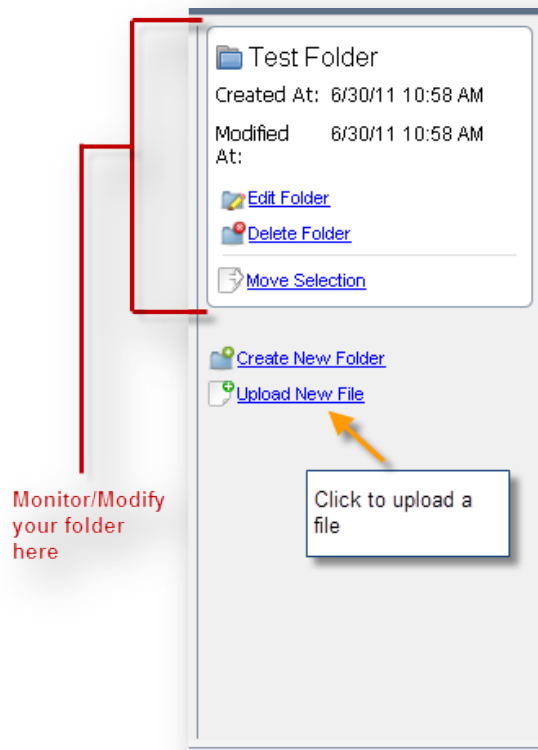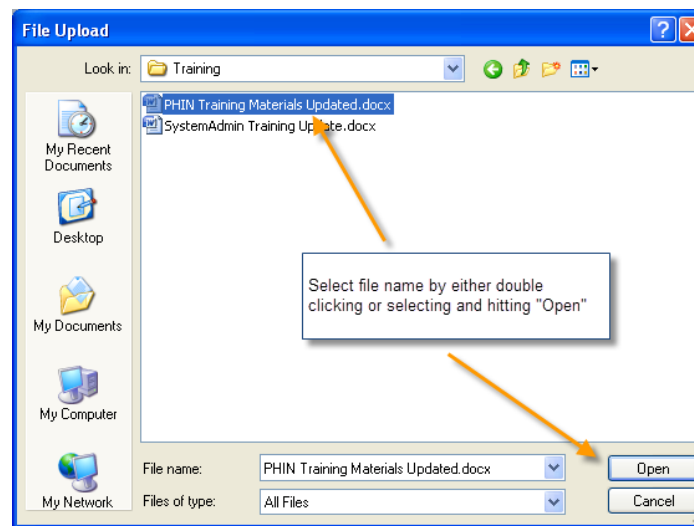
Once you click on "Upload New File", a dialogue box will appear asking you to either enter the file name or browse for the file. Click "Browse" to look for the desired file.

The name will appear in the "New Document" window. Click "Save" to add to the folder.
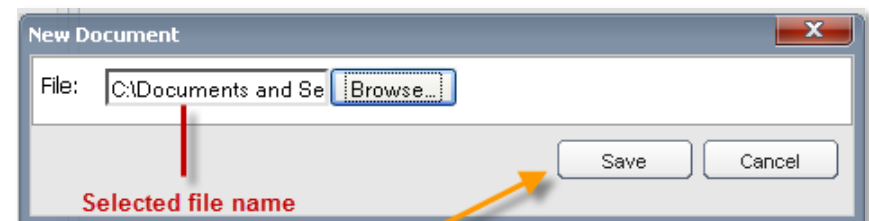
FILE MANAGEMENT

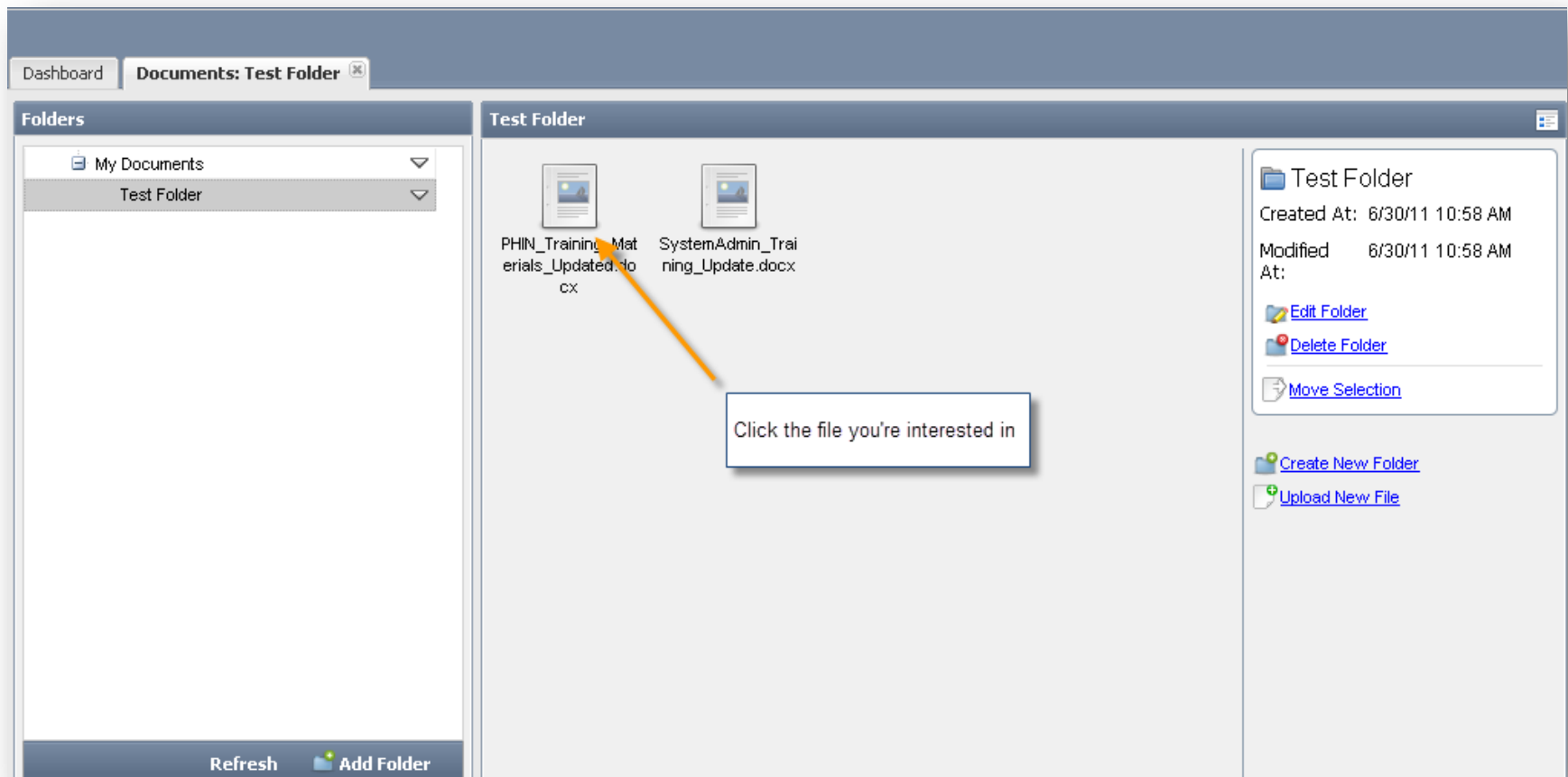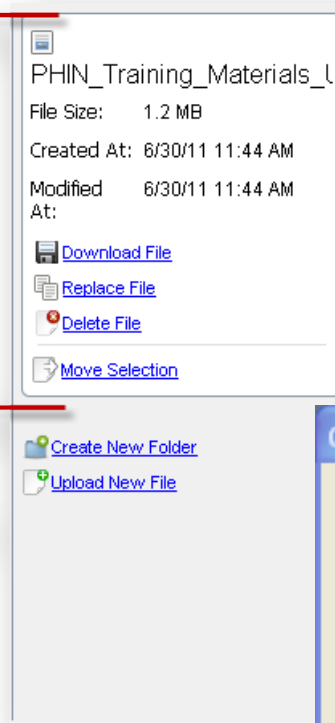When you've found the folder you're interested you can now find the desired file within the folder in the middle column. To open the file, double-click on it.

Notice how your options change on the right-hand column. If provides dates and times of the file uploading and latest modification. It also gives you choices to:

- Download the file
- Replace the file
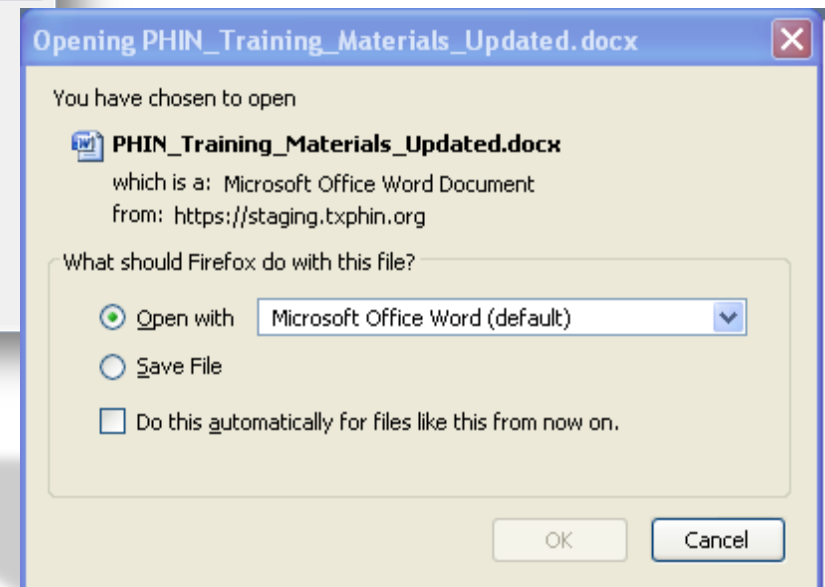- Delete the file
- Move the file to another folder

PHIN_Training_Materials_U

File Size: 1.2 MB

Created At: 6/30/11 11:44 AM

Modified   6/30/11 11:44 AM
At:

Download File
Replace File
Delete File

Move Selection

Create New Folder
Upload New File

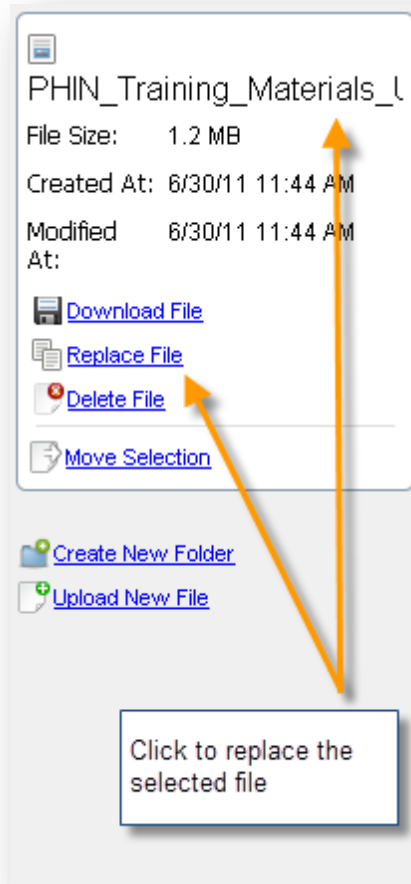Monitor/Modify the
file here

DOWNLOAD FILE

There are two ways to download the

file. You can double click the file name or you

you can select "Download File" from the right
column.
A dialogue box will appear asking you to
either "Open" or "Save" the file .

Opening PHIN_Training_Materials_Updated.docx

You have chosen to open

PHIN_Training_Materials_Updated.docx

which is a: Microsoft Office Word Document
from: https://staging.txphin.org

What should Firefox do with this file?

Open with   Microsoft Office Word (default)

Save File

Do this automatically for files like this from now on.

OK   Cancel

If you have "Author" or "Admin" permission, you can update and edit files. If you have downloaded and edited a file you can replace the original with your updated version. First, click "Replace File" on the far right.


PHIN_Training_Materials_U

File Size: 1.2 MB

Created At: 6/30/11 11:44 AM

Modified At: 6/30/11 11:44 AM

Download File
Replace File
Delete File

Move Selection

Create New Folder
Upload New File

Click to replace the selected file

Replace Document

File: [ ] Browse...

Save   Cancel

Click to browse for the file

Just as you did when posting the original file, you click browse and find the updated/edited/replacement file.

**File Upload**

Look in: Training

UPDATE PHIN Training Materials Upd...
SystemAdmin Trai...ng Update.docx

My Recent Documents

Desktop

My Documents

My Computer

My Network

Double-click the filename or select and click open

File name: UPDATE PHIN Training Materials Updated.doc   Open
Files of type: All Files   Cancel
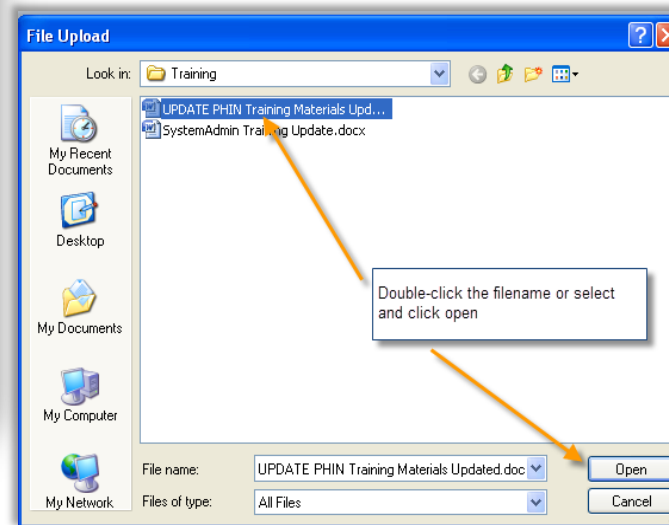
Again, the file name appears in the browser and you must click "Save" to replace the original file.

Replace Document

File: C:\Documents and Se [Browse...]

Save   Cancel

Click "Save" to replace the file
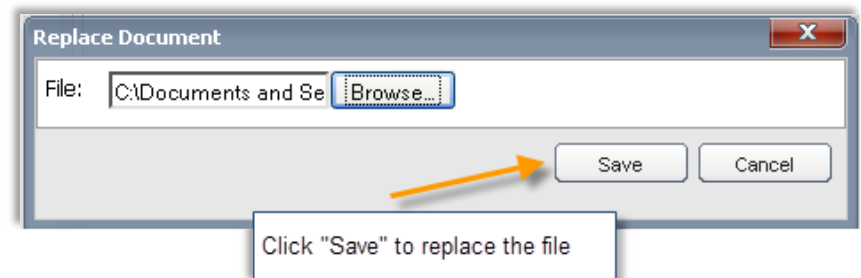
The file will be replaced and when you select it, you can see to the far right that the file information has been updated as well to show latest modification.
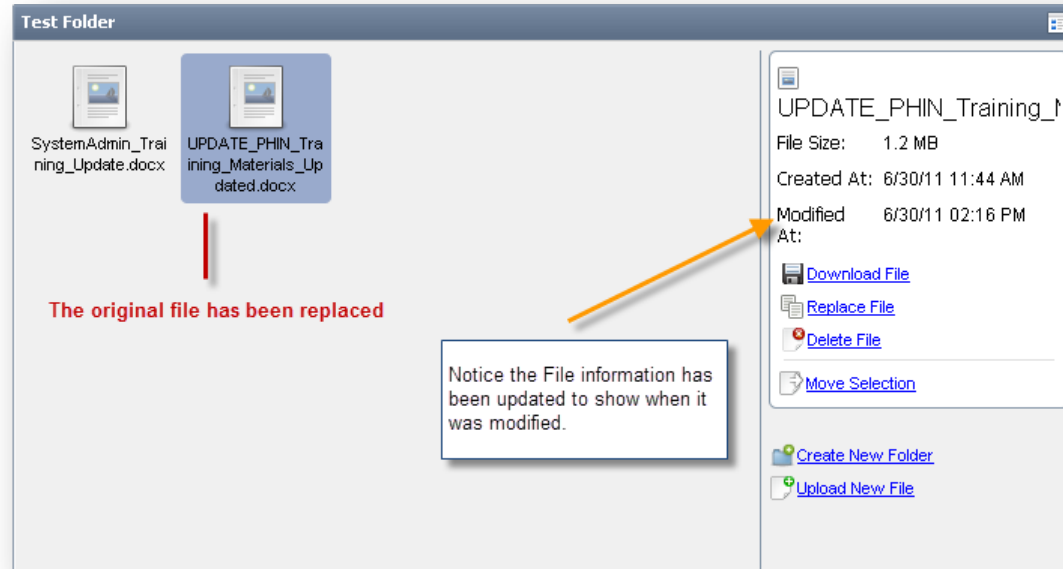

If you have "Admin" permissions you can also delete files. Select the file you wish to delete and then click "Delete File" found in the far right column. A dialogue box will appear asking if you're sure you want to delete the file. Click yes if you're sure or No if you don't wish to delete.
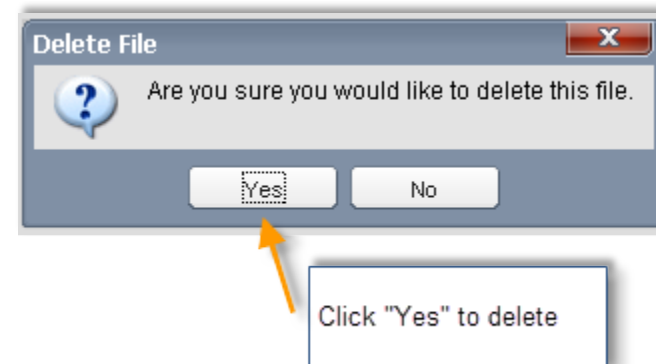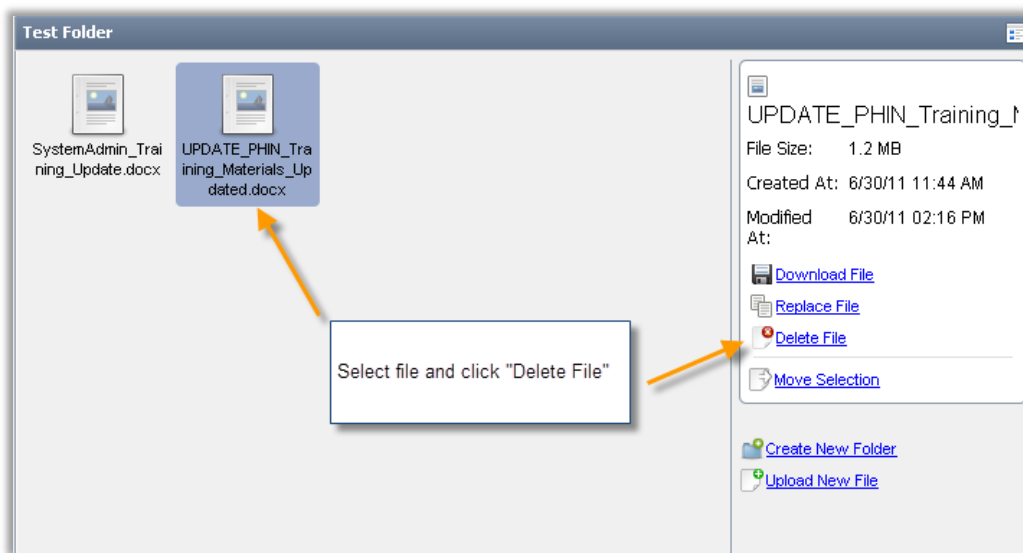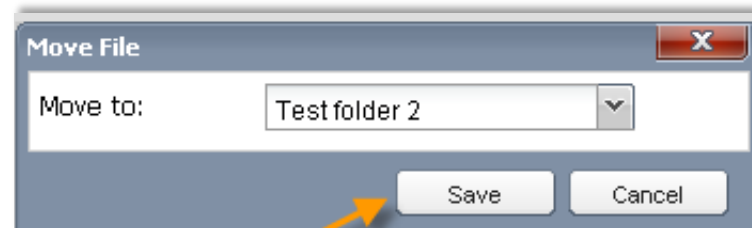
If you decide that the file should be in another folder you will use the "Move Selection" function.
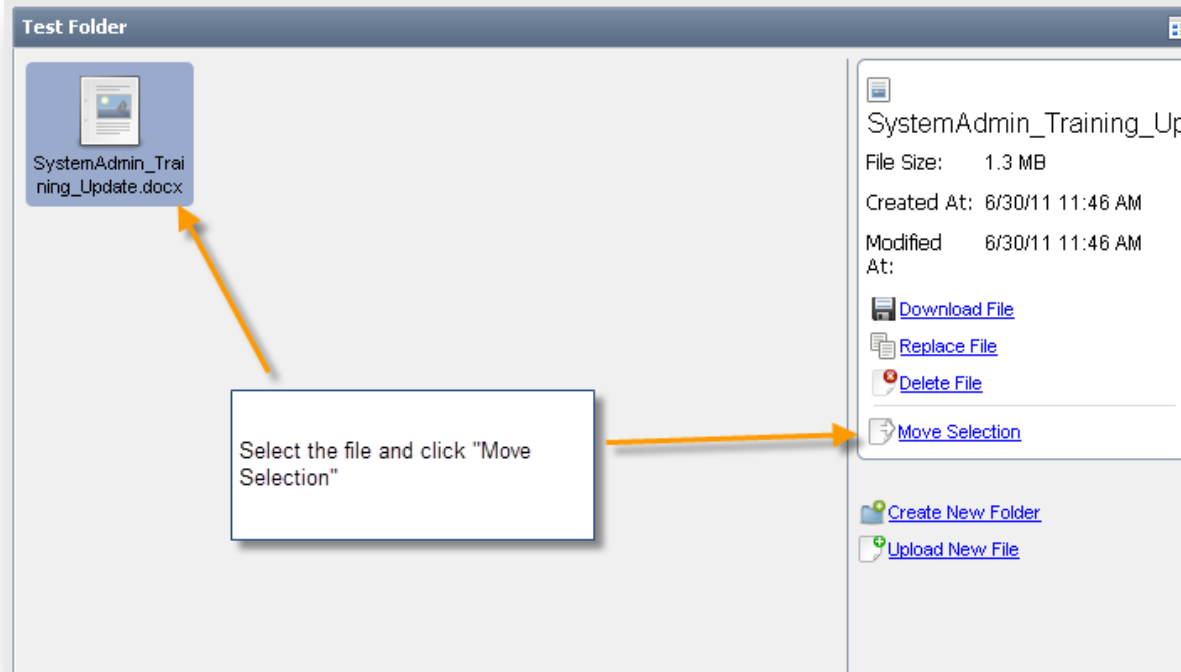
Select the file you wish to move and click "Move Selection" found in the far right column. A dialogue box will appear asking you to enter the folder you wish to move the file to.
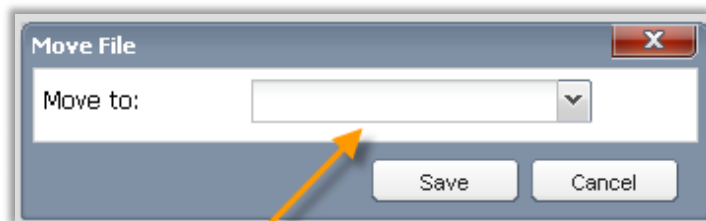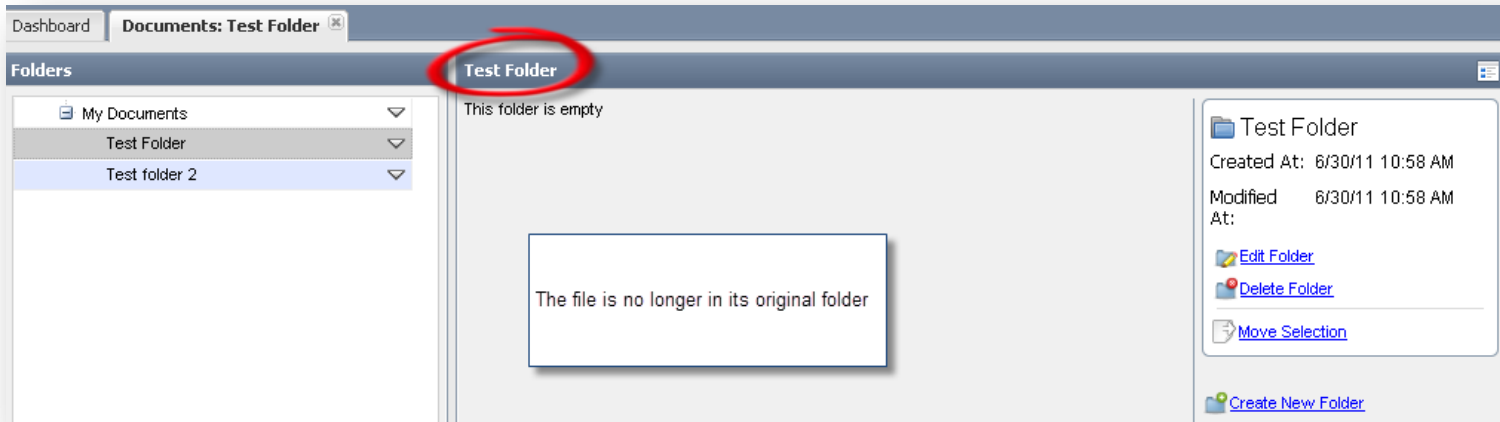
The file will no long longer be in its original folder. In this case "Test Folder".

Click on the folder where you moved the file (here "Test Folder 2) and you will see the file now appears in that folder.
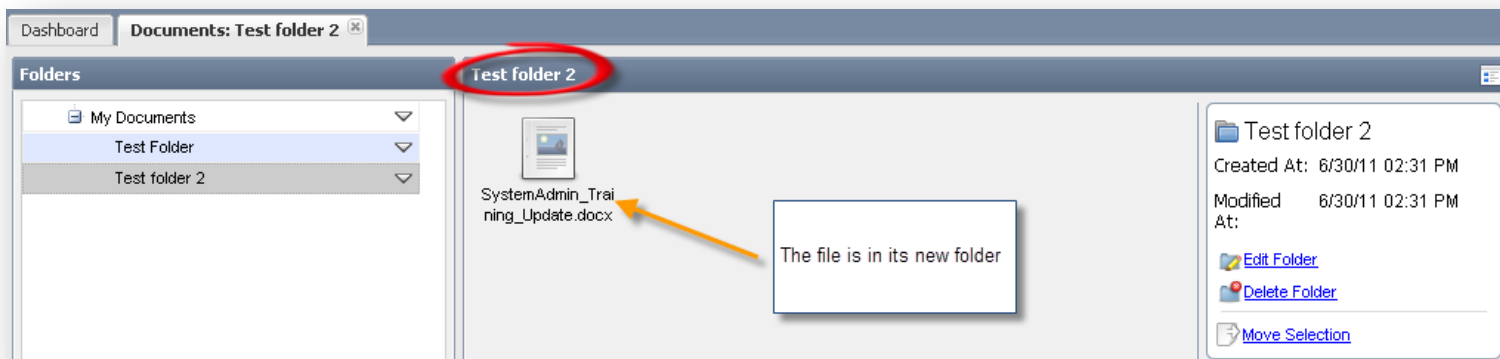
Note: Just like computer folders and files you can have folders within folders

Notice, the folder titled "Health" is found in the "Test Folder