FileBank Module Instructions

The FileBank module allows the user to organize and store files that relate to their organization and web-site. Within the module users or groups can be pointed to files stored here for easier access. Due to the organizational structure of Folders and Sub-folders, users are able to actively maintain their content and share it with internal staff or third parties. The following sections demonstrate how to upload a file to the FileBank module, edit existing files and how to generate and create folders and their sub-folders.

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MANAGE FILES

1 **Manage Files :** This shows the file structure and the files within the folder that are in the database.

Manage Folders : Lets you organize the folders in your Filebank.

File Search: This lets you search the database for the files by the BlobID.

2 **Folder List:** This is the list of main file folders on the website. Click the "+" signs to expand the list, and click the "-" signs to shrink the list.

3 **Sort By:** Choose to sort and view files by Date, Title or Form No.

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MANAGE FILES: EXPANDED

1 **Folder List (Expanded):** This is what the folder list looks like once you have clicked a "+" sign.

2 **Subfolders:** Folders are contained inside other folders, a lot like how the folder system works on your computer.

3 **Now Viewing:** In this example we clicked on "Reference Library," and we now see the files inside the folder and their details.

4 **Upload:** Click this button and you can upload a brand new file.

5 **Edit Info:** Edit the existing file information.

6 **Move / Delete / View:** Move a file to a new folder, delete it, or view it.
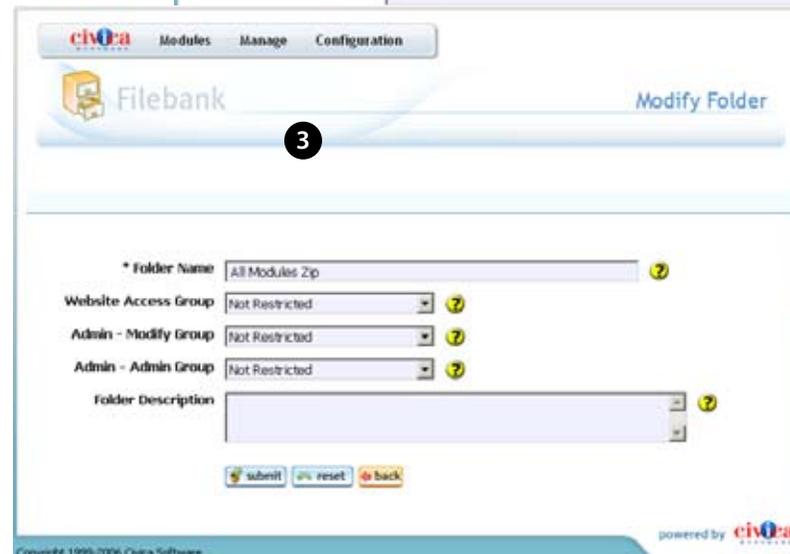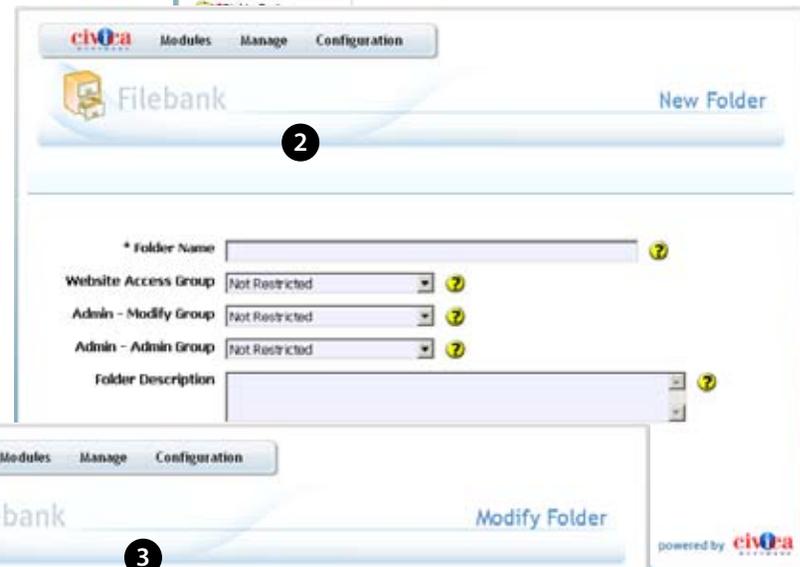
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MANAGE FOLDERS

1 **Manage Folders:** In this part of the Filebank you can add new folders, create subfolders, and move, delete or modify existing folders.

a.) Add New Root Folder: Create a main folder.

b.) Add New Subfolder: Create a SubFolder folder.

c.) Move Selected Folder: Move a specific folder within another folder.

d.) Delete Selected Folder: Delete a specific folder.

e.) Modify / Rename Selected Folder: Modify an existing folder or properties previously assigned. In addition, you can also reassign property values to a folder.

2 **New Folder:** When you create a new folder, be sure to give it a name and specify where to access the folder from the website.

3 **Modify Existing Folder:** You can also modify folders that already exist. You can rename and reassign who will access these folders.

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NEW FILE / MODIFY FILE

1 **New File / Modify File:** When you click to "UPLOAD" a new file, or to "Edit Info" on an existing file (See example to right; in this example we are Modifying a file.).

2 **Helper Question Marks:** If you ever have a question about what each field in the form is for, hover over the Question Mark icon to the right and it will give you an explanation.

3 **Title:** Enter the name of the file here.

4 **SubTitle:** This is just in case you need it.

5 **Document Number:** Leave blank, it will be automatically assigned once you create a new file.

6 **File Upload:** Browser your computer for the file you want to upload to the FileBank.

7 **Instruction FIle Upload:** Upload a file with instructions that help explain the first file.

8 **Revision Date:** One of the more important and often over looked fields to fill out is "Revision Date." In this field you should insert the approximate date that your file was created. When files are viewed through the website they are listed in chronological order starting with the newest file first. If you leave this field at its default date the computer will think that the file you are uploading is the newest, which is not always the case.

9 **File Description:** Enter a description of the file being uploaded in to the system.

10 **File Keywords:** Specific words to assist when searching the system for specific files and their content.

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NEW FILE / MODIFY FILE... CONTINUED

11 **Language:** Choose a language from the drop down menu

12 **Classification:** Internal means that it is intended for the Intranet and external means it is intended for the Internet.

13 **Deparment:** Check which City departments will have access to use your file.

14 **Type of Document:** Check which best describes the document you will be uploading.

15 **Type of Image:** Choose the type of image that you are uploading.

16 **Is File Active?:** Check this box if you want the file visable to viewers.

17 **Submit / Reset / Back:** Submit will upload the file and description. Reset will reset the form to a new blank form to start over. Back will cancel the changes you have been making and take you back to the Filebank page.

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FILE SEARCH

1 **File Search:** In this part of the Filebank you can search for specific files by their BlobID. A BlobID is the ID of the file that is uploaded into the FileBank.

2 **Enter BlobID:** Enter the file's BlobID and you will be able to search the database for the corresponding file. Once you have found this file you can move it to different folders or edit it's content. Click "SEARCH" to find this file.

3 **Enter BlobID (result):** After clicking search the BlobID you searched for should still be in this field.

4 **The file is named:** This area should show you the title that was given to the file.

5 **The file is located in the following directory:** This line should give you the path to find the file you are looking for. In this example the file is located through this path: Departments > Finance > Special Assessments > CFD Mello Roos Services Districts > Westpark CFD#2 - (Public Services).

6 **InsertCivica:** The file search will really help when you are editing a page on the website and you choose to "InsertCivica" (link to a file). Knowing the path of the file will help you find your file in the ginormous drop-down list that the InsertCivica function gives you.