



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.

The screenshot shows the 'Filebank' interface. At the top, there is a navigation bar with 'civica' logo, 'Modules', 'Manage', and 'Configuration'. A dropdown menu is open under 'Manage', showing 'Manage Files', 'Manage Folders', and 'File Search'. A callout '1' points to this menu. Below the navigation bar is a header area with 'Filebank' logo and 'Manage Files' text. A callout '3' points to the 'SortBy:' section, which has three options: 'Date', 'Title', and 'Form No.'. Below this is a list of folders with expand/collapse icons. A callout '2' points to this list. The main content area shows 'Now Viewing: No Folder Selected' and 'No Files Found in this Location.' At the bottom, there is a footer with 'Copyright 1999-2006 Civica Software' and 'powered by civica' logo.

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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.

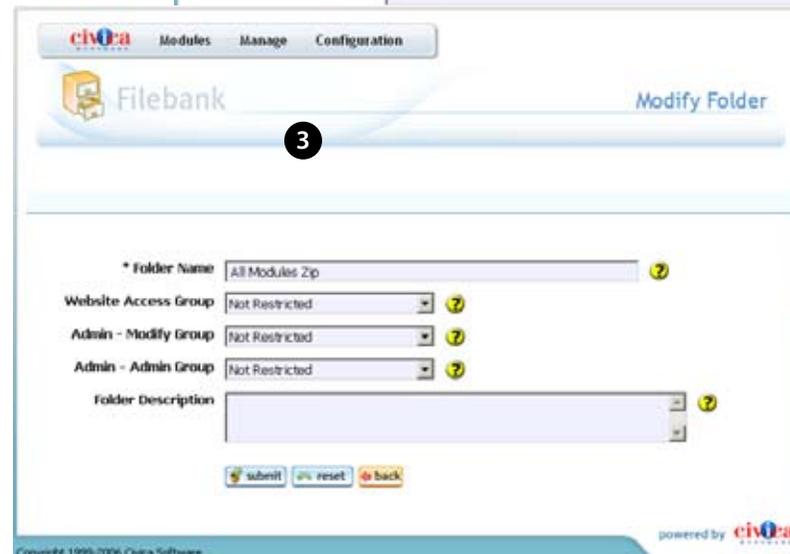
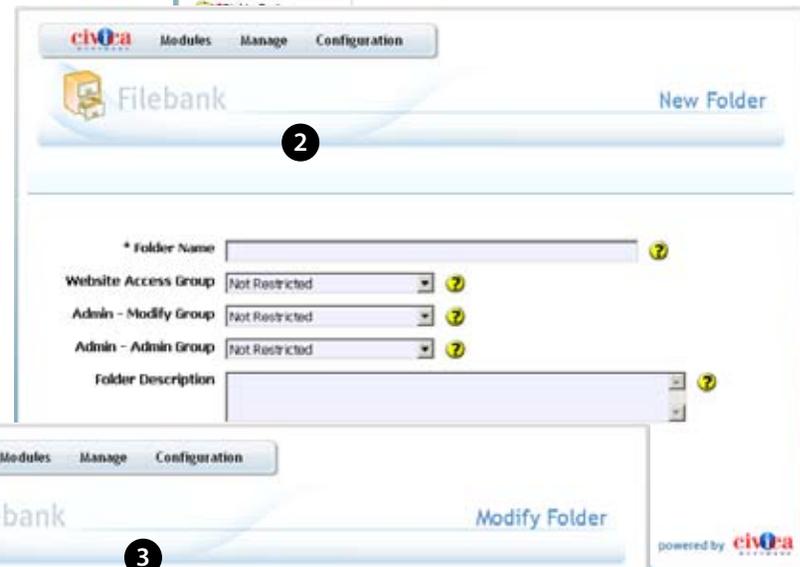
The screenshot displays the Filebank web interface. At the top, there is a navigation bar with 'Modules', 'Manage', and 'Configuration' links. Below this is the 'Filebank' logo and the 'Manage Files' title. The main content area is divided into two sections: a folder list on the left and a file list on the right. The folder list is expanded to show subfolders, and the file list shows two files with their details. The interface includes an 'upload' button and 'Active - Edit Info' links for each file. A copyright notice at the bottom reads 'Copyright 1999-2006 Civica Software' and 'powered by civica'.

SortBy:	Date	Title	Form No.
Now Viewing:			
		Forms (28)	
		sunset (Sunset.jpg)	
	8/28/2006	by Mark Kelly (size:69.5 KB)	
			Active - Edit Info
			Move Delete View
		test (capone_alt.jpg)	
	8/13/2004	by Stuart Gregg (size:17.6 KB)	
			Active - Edit Info
			Move Delete View

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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 overlooked 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

The screenshot shows the 'Filebank' 'Modify File' interface. At the top, there are navigation links for 'Modules', 'Manage', and 'Configuration'. The main title 'Filebank' is on the left, and '1 Modify File' is on the right. The form contains the following fields and options:

- 3 Title:** A text input field containing 'A-Z Index Module'.
- 4 SubTitle:** A text input field.
- 5 Document Number:** A text input field.
- 6 File Upload:** A file upload field with a 'Browse...' button.
- 7 Instruction File Upload:** A file upload field with a 'Browse...' button.
- 8 * Revision Date:** A date input field showing '8/15/2006'.
- 9 File Description:** A large text area.
- 10 File Keywords:** A text input field.
- * Language:** A dropdown menu set to 'English'.
- * Classification:** A dropdown menu set to 'Internal'.
- Divisions:** A group of checkboxes including 'Administration', 'Labs', and 'Information Technology'.
- Type of Document:** A group of checkboxes including 'Drawings & Plans', 'Map', and 'Technical Specification'.
- Type of Image:** A group of checkboxes including 'Caption', 'Logo', and 'Photo'.
- * Is File Active?:** A checked checkbox.

At the bottom of the form are 'submit', 'reset', and 'back' buttons. The footer includes 'Copyright 1999-2006 Civica Software' and 'powered by civica'.

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 **Department:** 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 visible 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.

The screenshot shows the 'Modify File' form in the Filebank application. The form includes the following fields and options:

- * Title: A-Z Index Module
- Subtitle
- Document Number
- File Upload: Browse
- Instruction File Upload: Browse
- Location
- * Revision Date: 8/16/2006
- File Description
- File Keywords
- * Language: English
- * Classification: Internal
- Divisions: Administration, Labs, Information Technology
- Type of Document: Drawings & Plans, Map, Technical Specification
- Type of Image: Clipart, Logo, Photo
- * Is File Active?:
- Buttons: submit, reset, back

Numbered callouts (11-17) point to the Language, Classification, Divisions, Type of Document, Type of Image, Is File Active?, and submit/reset/back buttons respectively.

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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 its 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.

