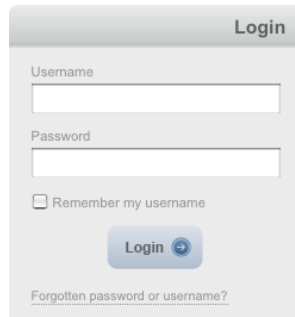


Online File Exchange **User** Quick Start Guide

Administrator Quick Start Guide is on page 2.

Login

After the site administrator creates your account, you will receive an email with your username and temporary password. Go to the web address indicated in the email and log in with your username and temporary password. You will then see a screen that will allow you to create your own password.



Create Folders*

Click the **Create Folder** button and type in the name for your folder (using letters, numbers and underscores only).



Upload/Send Files*

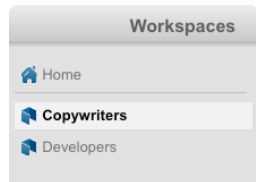
First, navigate to the folder you wish to upload the file to.

- Click the **Upload/Send Files** button.
- Click the **Browse** button and select the file you wish to upload.
- If you wish to add a comment or a file ID, add more files, or send the file(s) to someone else, click the appropriate links.
- When ready, click **Upload Files** (or **Cancel**).
- **CAUTION:** Don't close or quit your browser during transfer or your upload will be canceled.



Workspaces

If the site Administrator has assigned you to more than one Workspace, they will appear under the **Workspaces** window on the left. To choose a workspace (when first logging in) or to change the Workspace you're in, simply click the name in the window.



Navigation

- To navigate into folders, simply click the folder name.

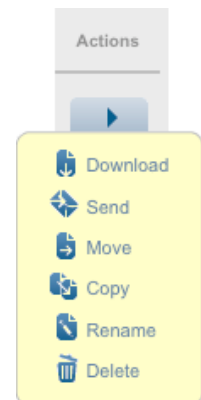
Location: Home → Designers → Annual_Report_Assets

- To navigate back up, click on the appropriate folder name in the **Location** path.

Actions Menu*

First click the blue arrow next to the file name under the Actions column.

- To Download a file, click the **Download** icon (you can also simply click the file name itself).
- To send a file to someone, click the **Send** icon and enter the person's email.
- Click **Move** or **Copy** and then choose a destination for the file to be moved or copied to.
- **Rename** allows you change the file name.
- To delete a file, click **Delete**.



Files/Search

To search for a particular file (or group of files), click the **Search** icon, enter the search criteria in one or more fields, and click **Begin Search**. The search window will disappear and your results will be shown. To return to your files and folders, click the **Files** button.



Help/Logout

[? Need Help?](#) | [✖ Logout](#)

If you require additional help in using the Online File Exchange, click the **Help** button. There you can read the Frequently Asked Questions or get contact information for asking questions or requesting more help.

When finished using the system, always click the **Logout** button to prevent anyone else from accessing your site from your computer without your knowledge.

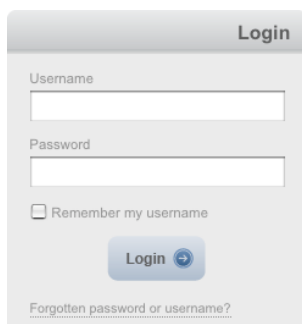
*Specific actions only available if the granted permission by the Administrator.

Online File Exchange Administrator Quick Start Guide

User Quick Start Guide is on page 1.

Login

After signing up, you will receive an email with your username and temporary password. Go to the web address indicated in the email and log in with your username and temporary password. You will then see a screen that will allow you to create your own password.



Control Panel



The following items can be found in the **Control Panel** area (only available to Administrators):

Add New Workspace

The first thing you should do is create a workspace (you will need to do this before adding any user who isn't an administrator). Go to **Workspaces** in the left menu, then click the **Add New Workspace** button and type in the name of the workspace you wish to create. Then click **Add Workspace**.



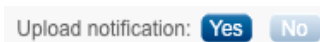
Add New User

- To add a user, go to **Users** in the left menu, then click the **Add New User** button and fill in the required info.
- Under "**Permissions**", assign the user the specific permissions you wish them to have.
- Under "**Add User to Workspaces**" choose the workspace(s) you want the user to belong to (not available if you've selected the user to be an administrator).
- Then click **Add User** (or **Cancel**).



Upload Notification

If you wish certain users to receive an email each time a file is uploaded to a workspace they belong to, go to **Users** in the left menu and click the **Yes** button next to "Upload notification".



Branding the Site

- To add your company's logo to the site, first go to **Account Management** in the left menu and click **Edit** next to "Site Customization Information".
- Create your logo to the proper size and format as listed below "Organization Logo".
- Click the **Browse** button and select your logo.
- Then click **Update Account Info** (or **Cancel**).

Files



The following items can be found in the **Files** area:

File/Folder View and File Only View

Files can be viewed two different ways.



- The **File/Folder View** lists files and folders in their hierarchical order, just like on your desktop computer.
- The **File Only View** lists all files regardless of folder structure (and no folders appear in this view). Clicking "**View file location**" will take you to that file in the File/Folder View.

Search / Help / Logout

See explanations for these functions in the **User Quick Start Guide**, page 1.