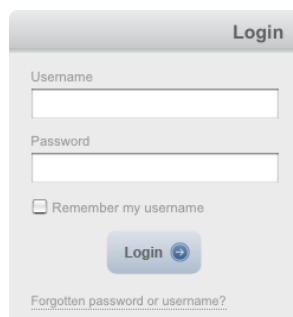


Online File Exchange **User** Quick Start Guide

[Administrator](#) Quick Start Guide is on page 2.

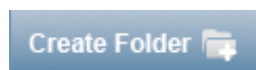
Login

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 (consistent with the password requirements of the site).



Create Folders*

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



Upload/Send Files*

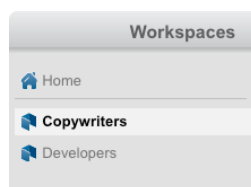
First, navigate to the folder you wish to upload the file to.

- 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

The workspaces you belong to will appear in the Workspaces window on the left. To change the Workspace you're in, simply click the name in the window.



*If you've been granted these permissions by the Administrator.

Navigation

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

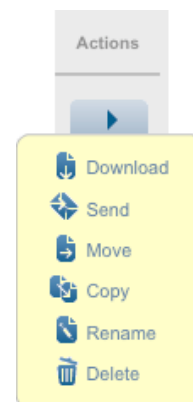
Location: [Home](#) → [Designers](#) → [Annual_Report_Assets](#)

- 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 or select their name from the list.
- 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 Need Help? link. There you can read the Frequently Asked Questions or get contact information for asking questions or requesting more help.

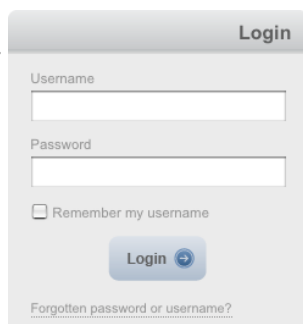
When finished using the system, always click the Logout button to prevent anyone else from accessing your site from your computer without your knowledge.

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 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 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 Workspaces" click "View all workspaces this user can join" and select the workspaces desired, or simply start typing the workspace name into the field provided.
- Then click Add User (or Cancel).



Notifications

If you wish certain users to receive an email each time a file is uploaded to or downloaded from a workspace they belong to, check the appropriate box under "Notifications" in the user edit window.

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

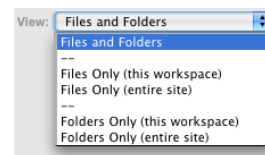


The following items can be found in the Files area:

File/Folder Views

Files can be viewed several different ways.

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



Search / Help / Logout

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