Intellial

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User Guide

Administrator Part

Pending Users

When any user registers, he/she will not be able to login immediately. All newly registered users will be displayed in "Pending Users" screen. The purpose of this screen is to check and authenticate the registered user before enabling his/her login. Administrator can also set initial permission for the user which can be altered later on.
Note: It is mandatory to SAVE the permission before your authenticate the user by clicking Authenticate button.

Authenticated Users

The screen will list all authenticated users. The screen can be used to do following things...

1. Change user details.
2. Add/Remove workspace access permission.
3. Add/Remove functional rights.
4. Block user (Blocked users will not be able to login until they are unblocked).

Blocked User

Blocked users will be listed in this screen. Using this screen administrator can perform following task...

1. Change user details.
2. Add/Remove workspace access permission.
3. Add/Remove functional rights.
4. Unblock user.

Workspaces

Using "Workspaces" screen admin can create new workspace. User can delete existing workspace.
Note: Be cautious while deleting workspace, all users belonging to this workspace will be lost access.

User Log

Each login action by the user will be logged in the system with the time stamp and workspace he/she logged in with. The details is important for audit and security purpose.
Administrator can view the log details by selecting User Name from the drop down list.

User Part

Creating a New Folder

New folder can be created under any folder or root.
To create a new folder under an existing folder, click on the folder in tree view, a list with files and folders under that will be displayed in main section of the screen, above the list all actions buttons will be displayed. Click on "New Folder" button. A "Create New Folder" screen will be displayed where you can see the location where the folder will be created, provide Name and Description for the folder and click on "Create" button. New folder should appear in list as well as in tree view (If not then click on Refresh button on top right corner of tree view)
Note: Currently only three levels of folders are supported in the system.

Uploading a File

A file can be uploaded in any folder or directly on root.
To upload a file select a folder and click on "Upload File" button. "File Upload" screen will be displayed showing location where the file will be uploaded. Select the file from your location machine by clicking on Browse button and provide short description of file. If you wish to notify members of the current workspace then check "Notify workspace members" option, an email will be sent to alert them.
In case you don't wont any other user to upload a newer version of the file then uncheck "Allow new version to upload" option (later its possible to Lock/Unlock the file manually).
Finally click on "Upload" button which will upload the file in the selected folder.

Deleting a Folder

To delete one or more folders, select the folders from list and click on "Delete" button.
Note: All files and sub-folders within the folder will be deleted

Deleting a File

To delete one or more files, select the files from list and click on "Delete" button.

Changing File/Folder Location

One or more Files or Folders can be moved from one folder to another.
To move files or folders, select them from the list and click on "Move" button. "Move Items" screen will be displayed, which will show the list of selected items to be moved. Select the "Target Folder" where the files or folders are to be moved and click "Move" button.

Uploading newer version of file

To upload a newer version of file, click on file name in list, "File Details" screen will be displayed.
Look for "Upload Newer Version" link (If file owner has locked the file then link will be disabled) and click on it, the "File Upload" screen will be displayed where you can upload a newer version of file
Note: File version must have same name as original file.

Viewing File History

Activity log can be viewed using History screen.
To view a file history log, Click on "Show" link on last column of file list.
"File History" screen will be displayed. File History screen contains all the activity performed on the file along with new versions. To see particular version of the file look for Version number and click on "View Version" link which will lead to "File Details" screen.

Viewing/Posting Comments on File

If any comments are already made on the file then a (i) small icon will be displayed along with file name in the list. To view the list of comments Click on the icon. You can also select the file and click on "Comments" button to view the comments. The "Comments" screen allows you to Post new comments as well as Print.

Creating a Task

To create a task for a particular file, select the file from the list and click on "Create Task" button. "Create Task-Flow" screen will be displayed. Provide Description for the task which will help assignees understand the purpose of the task. Select assignees from left hand user list and "Add" them to the right hand user list. Task flow will be executed as per the sequence of the users in the "Selected Users" list. In case if you want to remove a user from the selected list, select the user from the list and click on "Remove" button.
In you want to inform the users about the Due Date for the task then select the Date using drop downs.
Priority can be assigned to task by selecting it from Priority drop down box.
Click on "Save" button to save the task.
Note: If you uncheck "Task workflow?" checkbox then task will not be executed sequentially, instead all the assignees will be sent the task at the same time.

Using Pending Tasks

"Pending Tasks" screen displays list of tasks which are yet to be dealt by you. It show Priority, Owner, Highlight of Description, Due date and Link to view History. If you want to view full details of the task then click the Link on Description field. In case you want to see what actions have been already taken on task then click on the Show link of History field. To work with the task go to Task Details screen, there you have options to either Forward or Revert the task. When clicked on Forward button, task will be considered reviewed by you and forwarded to the next assignee. When clicked on Revert button, task will be reverted back to the assignee which you have selected from the "Next Assignee" drop down box. Before you Forward/Revert the task, Comments can be made which will appear History list when other users see it.
In case you have initiated the task then use "Task Tracking" button on top header section, by clicking it you can track the task flow.

Task Tracking

Using "Task Tracking" screen its possible to view status of each task which is created by user. User will be able to see "In Process" if task is not "Forwarded" by assignee, if task has more than one assignee then user can also view "History" by clicking "Show" link in the list. Task History will show you how many users have already Forwarded task. In case you want to Cancel the task during the flow, Click on "Cancel Task" button, task will be instantly cancelled. User can also Archive the task by clicking "Archive" button.

E-Mailing File

Any file can be email provided its not locked by its owner. To email a file to any external user, select the file from the list (Only one file can be selected at a time) and click on "E-Mail" button. Provide a valid email address in "Email To" field with other information and click on Send button. This will send an email to the recipient with the file attachment.

Searching a File

To search any file, provide a keyword which can be part of the file name or File Description. Click on Search button. This will display list of files found out for the provided keyword. To open a file from search result, click on File Name. To open the folder of file, click on "Open Folder" link.

Using Calendar

When you click on "Ca lender" button a popup screen will be displayed. Ca lender will only display task of the workspace members. To add a new task click on "New Task" link on left pane of the ca lender screen. To view all the task of particular day, click on the "Day" link on month view. To view task details click on Title link of the task on left pane. To remove a task click on Title link of the task on left pane, that will display task detail screen. Click on Delete button to remove the task.

Exporting Data

If you wish to export the folder data (files within folders excluding sub folders) then click on Export button on top header section. "Export Data" screen will be displayed. Select the folders for which you want to make an export and click on Download button. You will be prompted with File Download dialog box with zip file containing exported data.

Changing Password

Click on User Name link on top left side of header section. "User Profile" screen will be displayed. check the "Check to Change Password?" option which will enable password fields. Provide your password information and click on Save button.

Login

Provide your Username and Password, Username is your email address which is provided during registration. You also need to select a workspace from drop down.
You can select only those workspace where you have rights to access. In case if you forget the password then try Password Recovery tool on the login page.

Logout

To logout from the system, look for "Logout" link on top right corner of the Header Section.