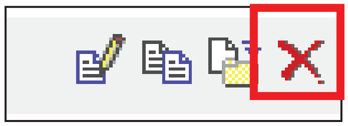
Deleting files in Storage

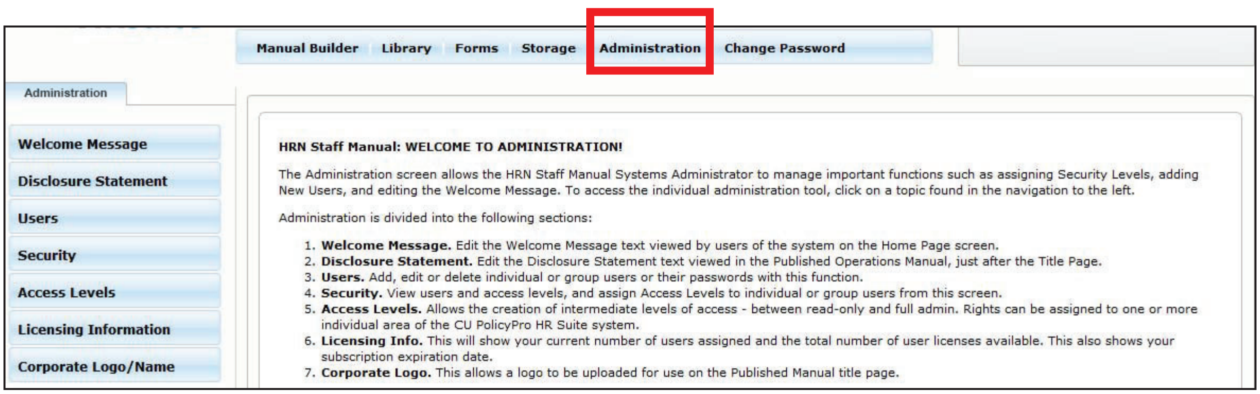
1. To delete a document from the Storage area, click the “Delete” icon to the far right of the file name.



2. This will permanently delete the document from the Storage area. If this document is deleted from the “Employee Resources” or the “Manager Resources” folders, it will no longer appear on the Home Page.

Administration

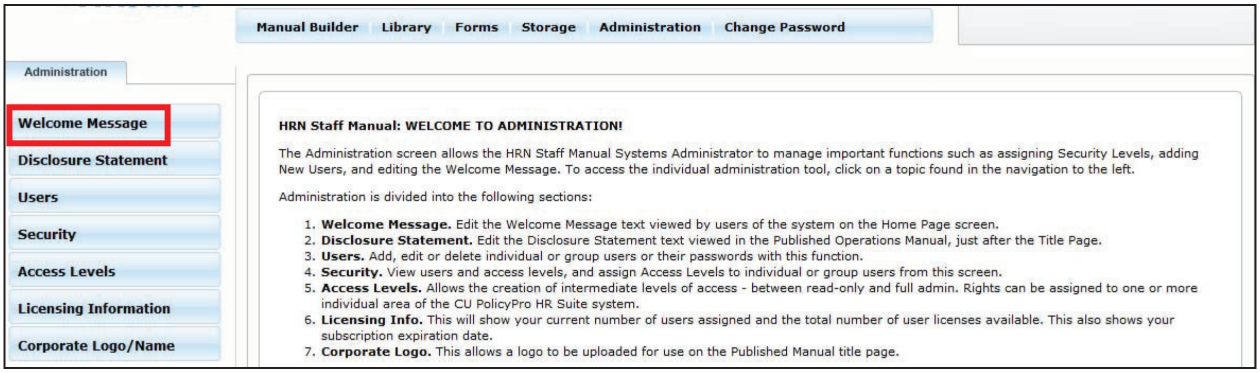
Click on “Administration” in the top navigation.



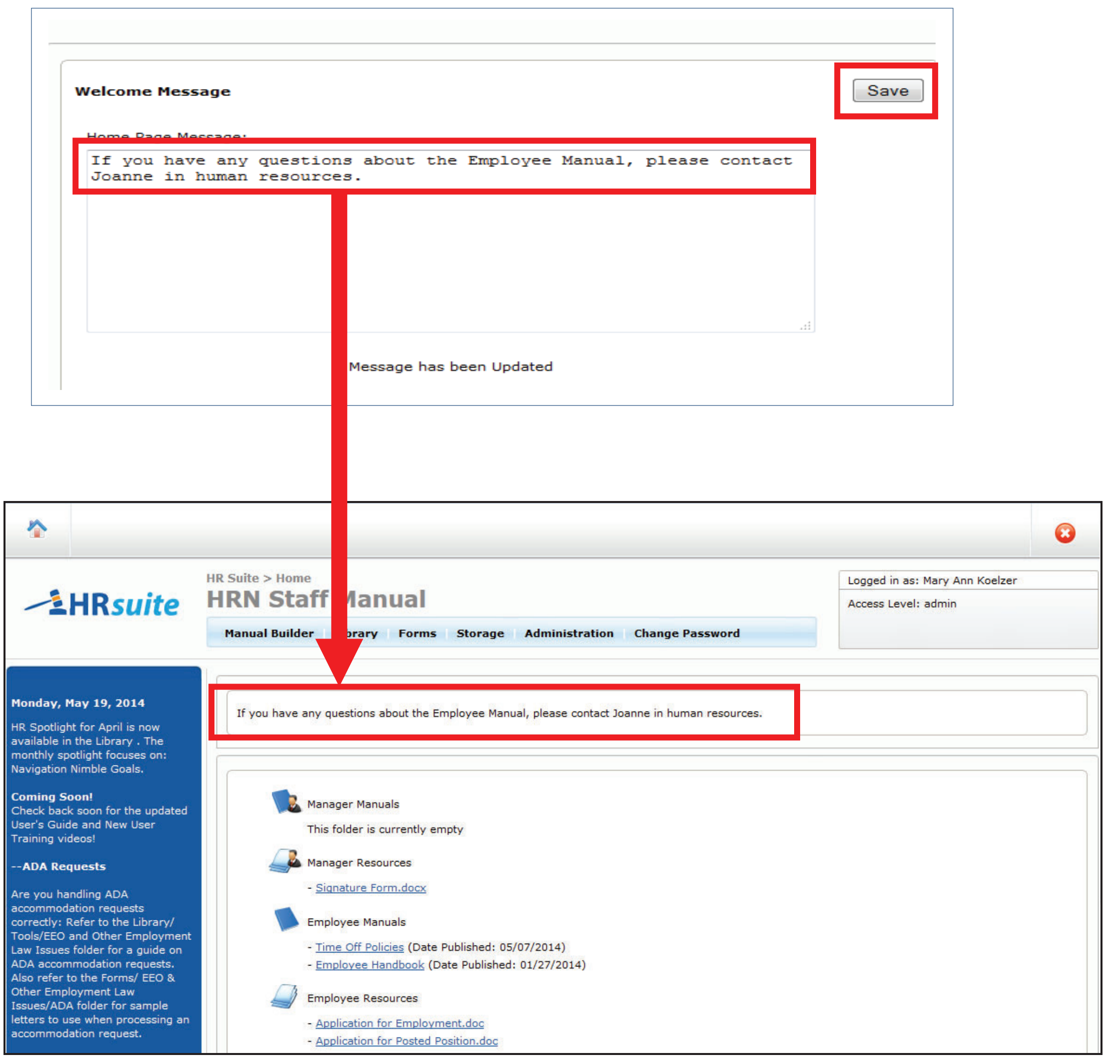
The Administration Area allows you to manage several functions, including the managing users, adding a Welcome Message to the Home Page, adding a disclosure to your published manual, uploading your logo, and viewing your license and subscription information.

Administration: Adding a Welcome Message to the Home Page

1. Click on the “Welcome Message” button on the left navigation.



2. Type in the “Welcome Message” field any message you want to appear on the Home Page. Click “Save” when done.



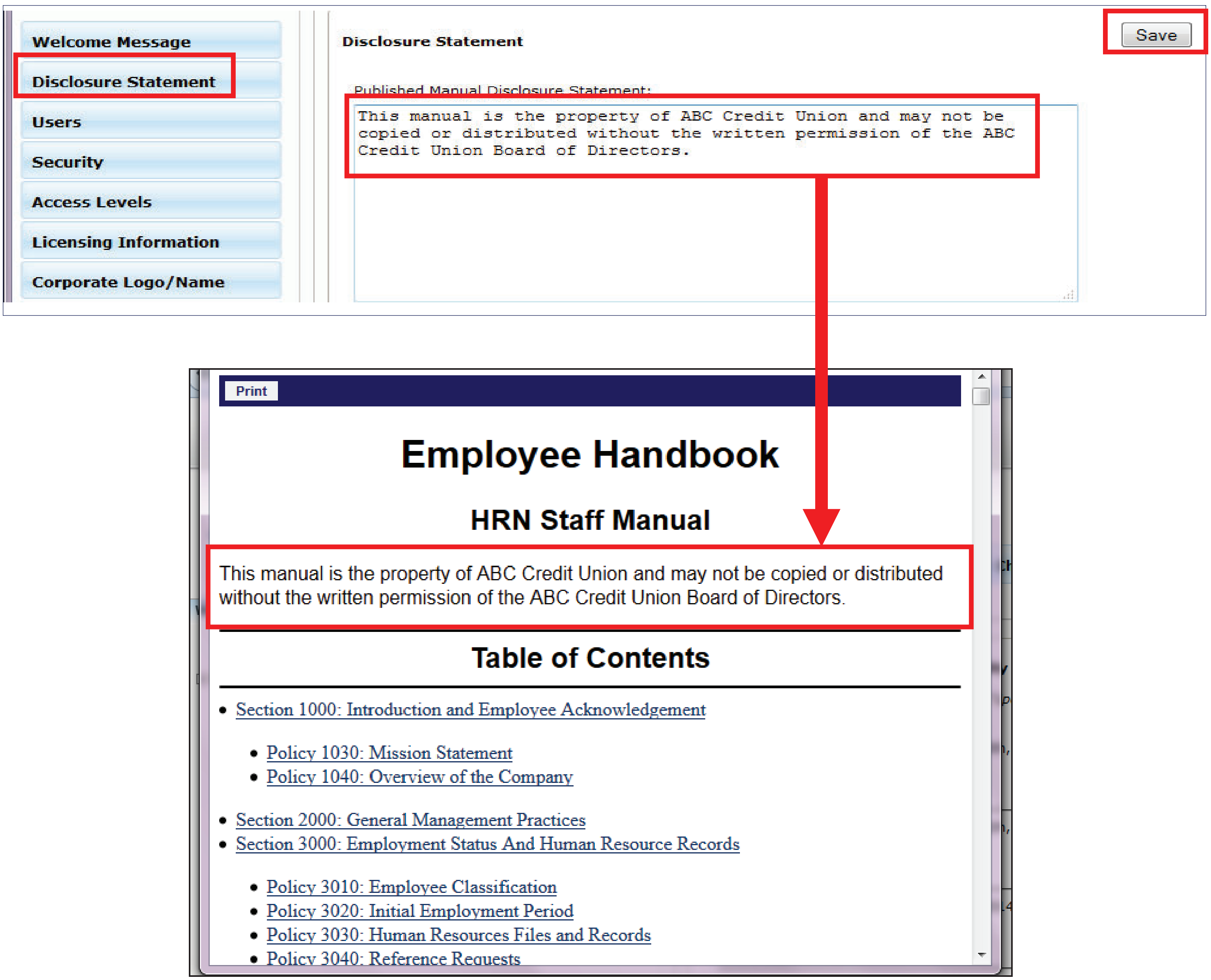
Administration: Adding a Disclosure to the Published Manual

1. Click on the “Disclosure Statement” button on the left navigation.

2. Type in the “Disclosure Statement” field the Disclosure you want to appear on the Published Manual. Click “Save” when done.

3. This message will now appear in the Published Manual, on a separate page between the Title Page and the Table of Contents.

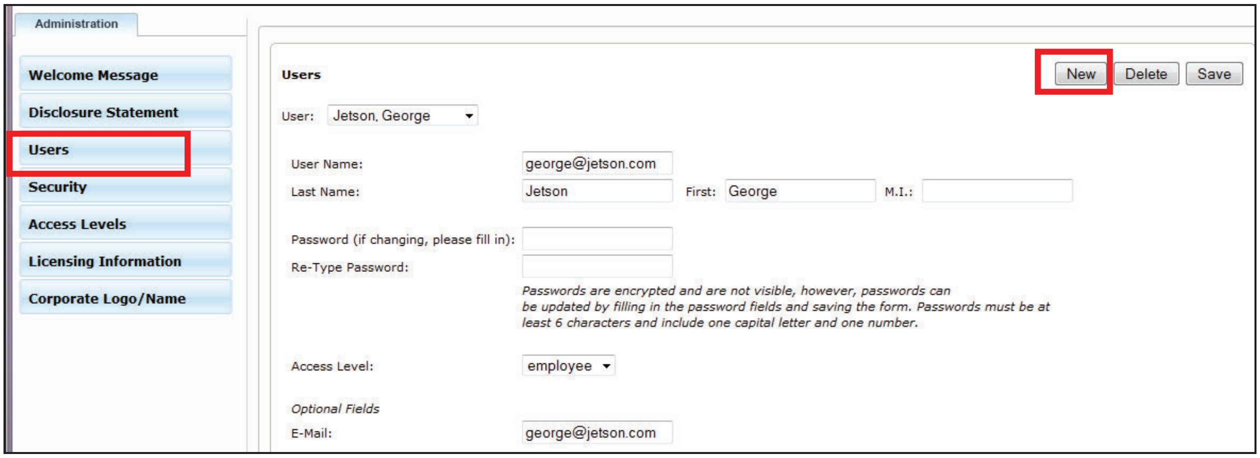
Note: Some organizations choose to use the “Additional text on Title Page” field to keep disclosure information on the Title Page. See page 37 for more information on publishing options and the “Additional text on Title Page” field.



Administration: Adding New Users

1. Click on the "Users" button on the left navigation.

2. A list of current users will appear. Click the "New" button on the far right side of the screen.



3. The "New User" form will appear (see below).

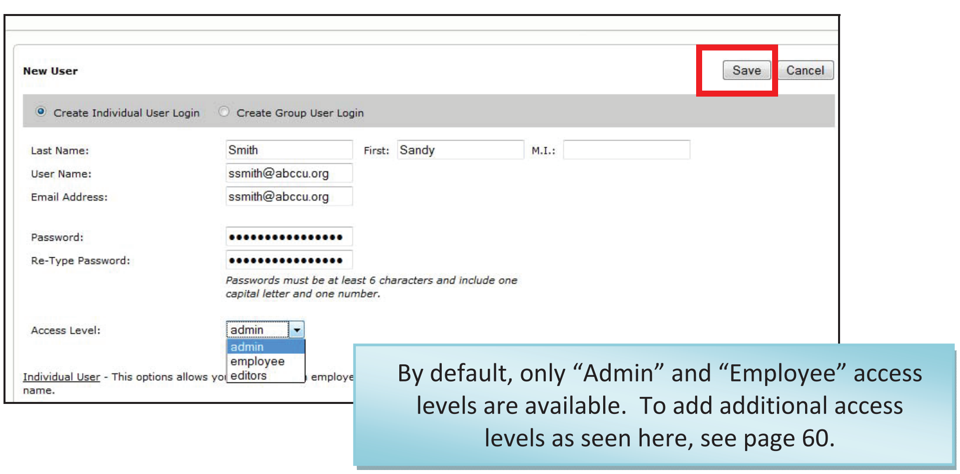
4. Two types of users can be created: Individual or Group Users.

   An Individual User is a distinct User Name and Password for a specific individual. A Group User is a User Name and Password that is shared among a group who all have the same access level (i.e. Board of Directors or Employees with read-only access). **Tip: An email address must be entered in order for the user to utilize the "Forgotten Password" function from the login screen. Group users will not have an email address option.**

5. For an Individual, type in the First and Last Name, the User Name, Email address, and Password. (Passwords are encrypted and must be entered in twice for security reasons). Group Users will have a Group Name (instead of First/Last) and will not have an option for email address.

6. From the dropdown list, choose the Access Level for this user.

7. When you're finished, click the "Save" button.



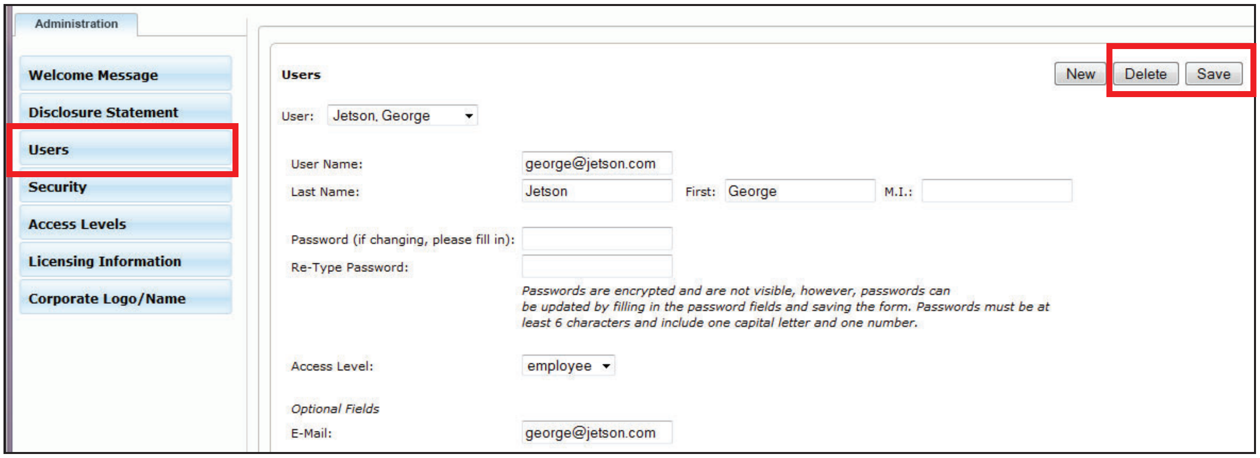
Administration: Editing or Deleting Users

1. Click on the “Users” button on the left navigation.

2. This will bring up the list of current users. Use the dropdown list to view individual user information.

3. For any user, you can update the user’s First or Last Name, User Name, Password or Access Level. After any changes are made, click the “Save” button.

4. To delete a user, click the “Delete” button. This will permanently delete this user.



Administration: Creating Additional User Access Levels

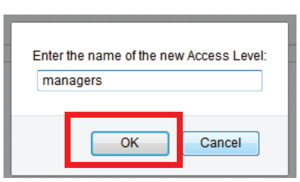
By default, there are only two access levels: Admin and Employee.

Admin level access gives the user full access to perform any function in the system. Admin is the only level of access that allows a user to access the Administration area. Employee level access is read-only. A user with Employee access can login and will only see items posted in the “Employee Manuals” and “Employee Resources” folders on the Home Page. No navigation (other than Change Password) will be available to an Employee level user.

You may find it useful to have access levels between Admin and Employee. Follow the steps below to create and define custom levels of access.

1. Click on the “Access Levels” button on the left navigation.

2. Click “New” to create a new access level. You will be asked to name the access level. Name the access level then click “OK”.



Administration: Creating Additional User Access Levels (continued)

3. A blank “Access Levels” form will appear. Use the checkboxes to determine what areas this access level can access.

- **Manual Builder** allows this user to access the Manual Builder area, and the user will have full rights to edit the Working Manual, including publishing, archiving, etc.

- **Library** allows the user to access the resources found in the Library.

- **Forms** allows the user access to the forms found in the Forms area.

- **Storage** allows the user full access to the Storage area, including uploading files and posting them to the “Employee Resources” and “Managers Resources” folders.

- **Manager Resources** will allow this user to see the documents posted in the “Manager Resources” folder, as well as manuals posted to the “Manager Manuals” folder.

  Note: If all options are checked, this user can do everything except go into the ADMINISTRATION area.

4. Once your options are selected for this user level, click “Save”.

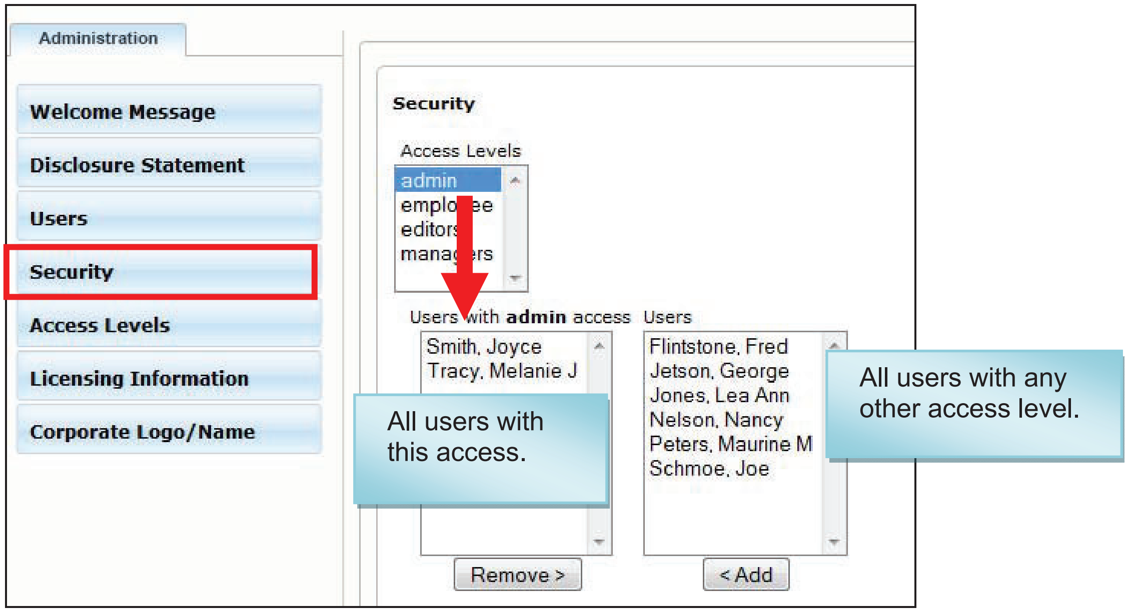
5. You can also delete or rename existing access levels, using the buttons on the far right of the screen.

Administration: Viewing/Editing Multiple Users at Once

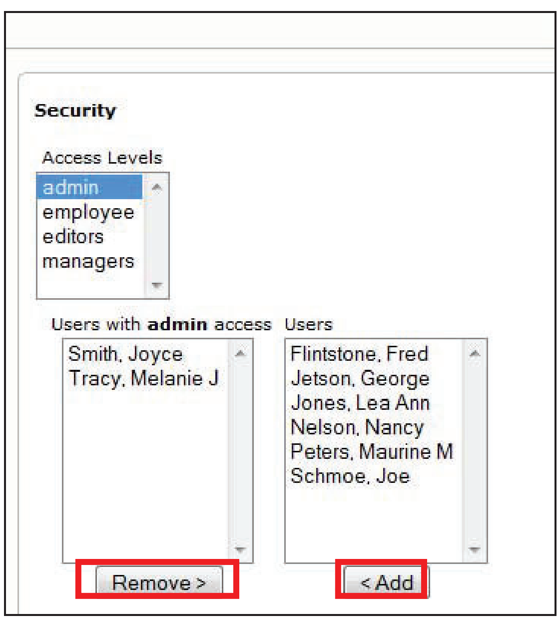
1. Use the “Security” tab to quickly view all user levels and user IDs, and to quickly change the user access level for multiple users at one time.

2. Click on the “Security” button on the left navigation.

3. Clicking on the various access levels will show all users with that level of access in the left side box. All users with any other level of access will appear on the right side.



4. Click on a user and use the “<Add>” or “Remove>” buttons to move users in or out of any access level. This can also be done by individual user in the Users tab.



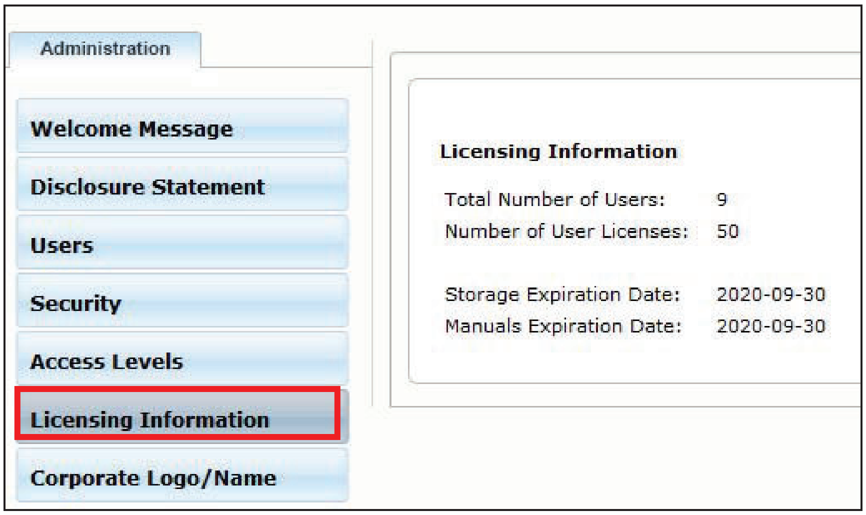
Tip: You will not see your own User Name. This prevents you from inadvertently removing yourself as an admin.

Administration: Viewing License and Subscription Information

1. To view your license and subscription information, click on the “Licensing Information ” button on the left navigation.

2. This will display the number of users you currently have set up, and the total number available. By default, each organization receives 50 user licenses.

3. This will also display your subscription expiration date.



Administration: Updating Corporate Logo and Organization Name

1. A logo can be uploaded in the Administration area to be used on the title page of any published manual.

2. Click on the “Corporate Logo/Name” button on the left navigation.

3. Use the “Browse” button to upload your logo. Your current logo will show below the “Browse” field. **Note:** Depending on the internet browser you are using, this button may be titled something other than “Browse.”

4. To replace a current logo, simply use the “Browse” button to upload the updated logo, which will replace any logo currently in the system.