Shared Files

BlueStep™ Shared Files

The BlueStep™ Shared Files system is available in Connect™, Team™ and HQ™ and provides a uniquely flexible and customizable area where important data may be stored for and accessed by your users. Under the Shared Files system, BlueStep's comprehensive security model is in force, protecting sensitive documents from those who should not have entry while providing availability to all those who require access.

Working with Shared Files
On the main Shared Files page, you will find a list and description of every file that has been uploaded for your organization, which also includes the size of the file and, optionally, the name of the person who posted it and the date it was uploaded. These files can be accessed, edited, deleted, locked or unlocked, organized into folders and rearranged to meet your organization's information needs.

The image below is from the standard Shared Files (List) format. If your Administrator has changed the format from List to Icon, the page will appear with each folder or file represented by an icon and the associated function icons displayed below it. See **Icon Format**, below, for details and illustrations. Please note that all of the following functions are applicable, the page is simply displayed in a different layout.

Any of these columns may be visible or hidden, depending upon the permissions level you have been granted. For instance, if you have Reader permissions, the Delete column will not appear, since deleting requires Editor permissions. Additionally, a column, such as Description, may be hidden if no file descriptions have been entered for any file. Also, any file or folder may be visible or hidden to you, depending upon the security assigned to that specific file or folder.

File Navigation

Each folder, if it contains any documents or subfolders, has an expand icon ➕ next to it. Clicking it will display all the documents or folders within that folder and change the expand icon to a collapse icon ➖. To close the folder, click the collapse icon. If you wish to expand or collapse all folders on the page, click either the Expand All or Collapse All tabs ⬇ **Collapse All** 🔻 **Expand All**.

You may access any document, graphic or file contained on the Shared Files tree, by clicking on its underlined name. To open the slideshow, click on the slideshow icon 🖼 (see **Slideshow**, below). To work with document version control, if you have purchased this option (see **Document Versioning**, below), click on the version icon 📄 to the right of the posted date. The locked and unlocked icons 🔒🔓 allow you to perform file locking or unlocking functions, if you have been granted the proper permissions. You may reorder any file or folder on the Shared Files tree using the two reorder icons 🔃 🔃 (see **File and Folder Reordering**, below). To edit the original File Upload page for any given document, click the edit icon ✏ opposite the document's name. If you wish to entirely delete the document, click the delete icon 🗑.

Slideshow

The slideshow icon 🖼 at the bottom of the Shared Files pagelet allows you to view graphic files in a slideshow version. On the main Shared Files page, slide icons appear opposite all files. If you click on any slide icon, all the files contained in that specific folder will be displayed, starting with the one you clicked.

If you would like to see every file in every folder, click the icon across from the root folder, then click the ☐ **Include Sub-Folders** box at the bottom of the slideshow screen, see below. The images will each appear, one after another, centered on the slideshow screen, formatted according to your choices in speed and size.

Miniature Rose Jewel Box
(3 of 3)

☐ Include Sub-Folders   (Done)

Any files that are not graphical format or are unsupported by the browser (Internet Explorer™, etc.), will appear as only as an icon representing Word, Excel or other program, not as images of the document. The slideshow was designed to produce images from graphical files only.

The slideshow options for image display speed are accessed from the Speed drop-down and include: Paused, Slowest, Slow, Medium, Fast and Fastest. The options for image display size are accessed from the Size drop-down and include: Small, Medium and Large. The Previous/Next button moves your view forward or backward by one image.
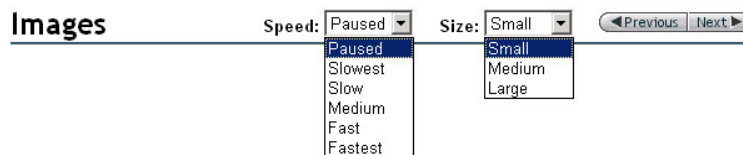
Document Versioning

By purchasing Document Versioning, members/users/employees can make edits and additions to any document, while maintaining the integrity of the original version and tracking data on each of the updated versions. With every version, administrators gain valuable insight into the importance of specific issues to users, along with their comments and changes.

To apply versioning to a document, you must upload the file to your Shared Files using the Add File button, the Add Multiple Files button or through Web Folders (see **Adding Files** and **WebDAV and Web Folders,** below). The enable versioning box ☐ **Enable Version Control** appears on the bottom of the File Upload screen, which you may check at this time or at any time in the future.

If the file has already been uploaded, you may turn on versioning by finding the document title on the Shared Files listing, then clicking the edit icon ✎ to the far right of the title. On the Edit File screen, click the Enable Version Control box, followed by the Save button. With Version Control enabled, you or anyone in your organization with Editor level permissions can perform version controlled edits to that document.

Using Version Control
To use versioning for any document, be sure that Version Control has been enabled. Click on the version icon to the right of the document name. This brings up the Version Directory.

Click on the underlined name of the document. If this document has multiple versions, you may click on any version in order to re-edit that version. Re-edited versions will always appear at the bottom of the list when saved.

Save the document to your hard drive or file system (opening a file from Shared Files without saving to disk is 'View Only' – no screen changes are recorded). Make whatever changes are desired throughout the document while it is on your computer.

While you are working with this document, it is effectively locked from use by any others (see **Locking and Unlocking**, below). If someone else desires to edit the same document at the same time, they may make edits on the copy contained on their own computer, but will not be able to upload them to shared files until the lock you have in place through your use has been released.

Uploading the New Version
When you are finished with your edits, you are ready to upload the new version to Shared Files. Go to the Shared Files screen and click the edit icon associated with the document with which you are working. On the resulting Edit File screen, use the Browse button to find the new version. Select the version and make any other changes needed on the edit screen.

Edit File

Current File	HQ Quick Guide 2004.doc
Updated File	HQ Quick Guide 2004.doc Browse... (Max upload is 20 MB)
Rename To	HQ Quick Guide 2004.doc
File Location	User Manuals
File Description	

☑ Enable Version Control   📁 **Version Directory**

Click the Save button when done and the new version will be added to the Version Directory screen.

HQ Quick Guide 2004.doc Version Directory   [Manage Lock]

Version	Name	Size	Posted By	Date	Delete
1	HQ Quick Guide 2004.doc	92 KB	David Patey	08/09/2004	🗑
2	HQ Quick Guide 2004.doc	91 KB	Jan Walker	08/09/2004	🗑
3	HQ Quick Guide 2004.doc	90 KB	Elise Rasband	08/09/2004	

Once a document version has been created, the versioning data, both in the document and on the Version Directory screen, cannot be changed. You may always check out the document again and make further edits, creating a new version, but the existing text, Version number, Size, Posted By, and Date information is permanent.

➡ To view any of the versions without checking out for editing purposes, simply click on the underlined document name.

Locking and Unlocking Files

The locking/unlocking feature of Shared Files exists to prevent several users from making multiple file/folder changes simultaneously, some of which would override or supersede others, without regard to the permission status of the user or the importance of the edits.

Locked folders or files are designated on the Shared Files screen by the locked icon 🔒; unlocked folders or files are designated by the unlocked icon 🔓, seen opposite the file or folder name.

The lock function of Shared Files operates under a series of universal rules from the WebDAV protocol (not designed by BlueStep), which all WebDAV-compliant systems must follow. These can be stated as a series of conditions, as described in BlueStep terminology.

Lock Types
There are four kinds of locks: **Primary, Secondary, Dependent-on-Parent, Dependent-on-Child**.

Locks, like BlueStep permissions, depend upon a hierarchical structure. The 'Parent' in Dependent-on-Parent refers to a folder that is in a direct line above the subject file/folder. The 'Child' in Dependent-on-Child refers to a file or folder that is in a direct line below the subject folder.

➤ A **Primary Lock** is the only type of lock a user may add or remove. A Primary Lock fully restricts every modifying action (except by the lock owner) concerning the file/folder, but not viewing. A Primary Lock may be activated by the author of a file/folder and removed by the same person. Additionally, anyone with Editor permissions for this particular resource may also unlock the file. All other lock types are added/removed through the functioning of this lock.

➤ A **Secondary Lock** restricts every modifying action, but must be unlocked from the Primary Lock position

➤ A **Dependent-on-Parent** Lock is a secondary lock and restricts deletion, renaming or moving of files or folders. However, all other modifying actions (editing, new content, locking, changing permissions, adding files or folders, etc.) are allowed.

➤ A **Dependent-on-Child** Lock is a secondary lock and restricts deletion, renaming or moving of folders, changing permissions and recursive locking. All other modifying actions (editing, new content, adding files or folders to a folder, etc.) are allowed.

Locks and Locking Performance
Locks and their performance are affected by:

➤ The type of resource being locked – folder, file or versioned file

➤ The person who currently owns the specific lock on this resource

➤ The process (BlueStep™ Shared Files web interface, Microsoft Office™, Web Folders, WebDrive, etc.) being used at the time of locking

➤ The permission level of the person working with the resource

➤ The type of lock that is applied to this resource

Locking Interface
Different locking interfaces are employed by every WebDAV compliant software application. All Microsoft Office 2000™ (and later) products lock a file when they open it and unlock it by closing. In WebDrive™, locking and unlocking is controlled through a tab on the Properties dialog box, after locking has been specifically enabled. Other clients/programs/processes support some form of locking and unlocking, but the interface and its functioning is controlled by the structure of the program and its specific configuration on your computer, not by BlueStep.

Locking Files
A fully locked (Primary or Secondary Lock) file or versioned file is restricted in regards to adding content, editing, deleting, renaming, moving location and changing permissions. A versioned file

can be locked by anyone with at least Author permissions. Non-versioned files require Editor permissions of the locking individual. A fully locked file results in other types of locks being activated on other file(s) in the hierarchy. A Dependent-on-Child lock is created for the folders in a direct line above the subject file back to the root level of the hierarchy. However, files and folders that are not in a direct line back to the root, but may be contained within folders that are direct line, remain unlocked.

Locking Folders
Any locking of folders must be done by users with at least Author permissions. A fully locked folder results in other types of locks being activated on other folder(s) in the hierarchy. A Dependent-on-Child lock is created for the folders in a direct line above the subject folder back to the root level of the hierarchy. However, files and folders that are not in a direct line back to the root, but may be contained within folders that *are* direct line, remain unlocked.

Folders may be locked either recursively or non-recursively. For a Recursive Lock, a Secondary Lock is created for all sub-folders and sub-files below the subject resource, flowing *down* through all levels of the hierarchy. For a Non-Recursive Lock, a Dependent-on-Parent Lock is created for all files and folders on the level immediately below the subject resource, but not for any hierarchical levels below the immediate level.

Unlocking Files and Folders
If you are the lock owner for the lock on any given resource, you may unlock the resource whenever and from wherever (from Shared Files, Web Folders, WebDrive, etc.) desired. You will always be able to go to BlueStep™ Shared Files and unlock it from there, in case the other processes have operated or closed abnormally. Users with Editor permissions may override locks, no matter who owns the lock.

▬▬► *If at any time you receive an on-screen message stating that a particular function cannot be performed with a file/folder in a Web Folder or if a Web Folder function fails to operate, go directly to the website version of Shared Files where the file/folder is contained and check 1) the locked/unlocked status of the item and 2) the permissions associated with that specific item.*

Following the on-screen instructions and information, as well as requesting that an administrator from your organization edit the permissions, will usually resolve any restrictions you have encountered.
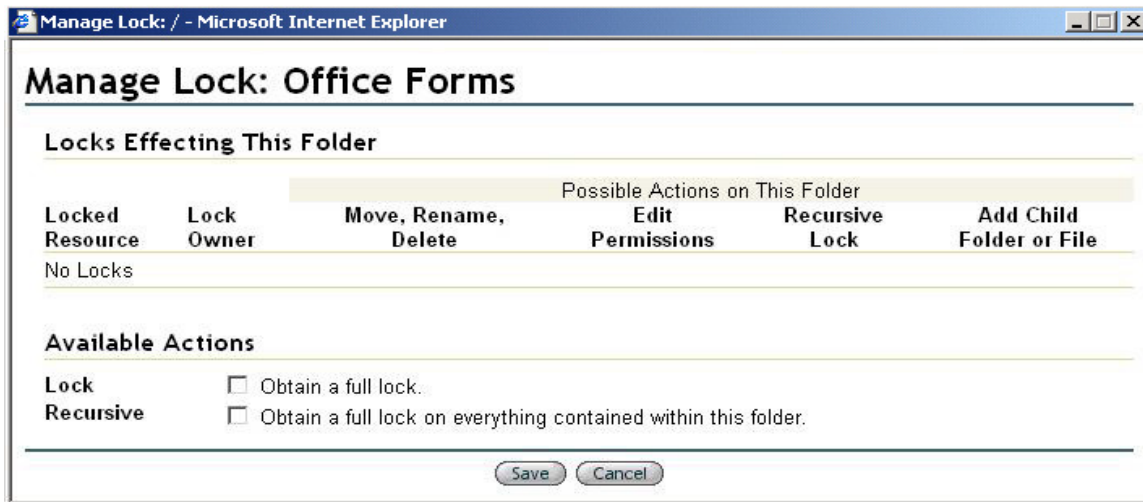
Shared Files Manage Lock Screen
The Manage Lock screen is accessed from the lock/unlock icons 🔒🔓 in BlueStep's Shared Files page and the Manage Lock link on the Version Directory. The Manage Lock screen is divided into two basic areas, Locks Affecting This Folder and Available Actions.

The Locks Affecting This Folder section is informational in nature. You may see what locks, if any, apply to what file or folder functions and who owns the lock.

The Available Actions section lists varying checkboxes that you may use to work with the lock. If you are not the lock owner, there may be no actions available to you, in which case, you would need to contact the lock owner for assistance in making file or folder changes.

The Manage Lock screen can display many variations for each file/folder within the Shared Files system. This makes for dozens of possible informational combinations on the screen. A couple of basic screens are displayed below.

Example 1 – A Non-Locked Folder

This Manage Lock screen is for a folder entitled Office Forms. When no locks are present, you will see the No Locks notation under Locked Resource and that the actions Move, Rename, Delete, Edit Permission, Add Recursive Lock and Add a Child Folder or File are available, if you so choose. There are two locking actions that you may select under Available Actions. The first is a lock on the folder, the second makes the lock a recursive lock, if it was activated. These two checkboxes operate in tandem, depending upon the selections made.

Example 2 – A Locked Folder, as seen by the lock owner

This screen is for the same folder as above, but displays the lock information. If you are the lock owner, red asterisks ✻ explain that the locking functions will not prevent your actions, only those of others. If you are not the lock owner, no asterisks will appear and you will see that your only recourse is to contact the lock owner for release of the lock. If you have Editor permissions, you will see locking override under Available Actions and will be able to proceed with unlocking.

Example 3 – Multiple Locks in Shared Files, as seen from the Root Folder

Manage Lock: Root Folder

Locks Effecting This Folder

Locked Resource	Lock Owner	Possible Actions on This Folder			
		Move, Rename, Delete	Edit Permissions	Recursive Lock	Add Child Folder or File
/Inventory/1lostsoftware.xls	Andrew Aaronson**	Locked**	Locked**	Locked**	
/Office Forms/Client Letters-E-mail/User Conference.doc	Jan Walker	Locked	Locked	Locked	
/Office Forms/Client Letters-E-mail/User Conference letter.doc	Jan Walker	Locked	Locked	Locked	
/Office Forms/Expenses/	Jan Walker	Locked	Locked	Locked	
/Office Forms/Expenses/expense report.xls	Jan Walker	Locked	Locked	Locked	
/Office Forms/	Andrew Aaronson*	Locked*	Locked*	Locked*	

Because you are the lock owner, this lock does not apply to you.
**You own this lock via the Web Folders/WebDAV interface. Therefore, this lock does apply to you except via WebDAV.*

Available Actions

Lock	☐ Obtain a full lock.
Recursive	A recursive lock cannot be obtained because one or more items within this folder are already locked.

(Save) (Cancel)

By going to the Root Folder in Shared Files, you can see all the locks throughout the Shared Files system. There are dozens of possible locking configurations, depending upon the number of files/folders and the factors listed above under Locks and Locking Performance, such as type of resource being locked, the lock owner, the type of lock used, etc.

WebDAV and Web Folders

WebDAV support is integrated into many of the latest operating systems on current computer systems and networks. When files and folders are stored on a remote server, such as those in BlueStep's Shared Files modules, the WebDAV protocol allows users of Windows, Mac or UNIX computers to access these items with the same ease as accessing the desktop on the user's own computer. Microsoft's client WebDAV support is called Web Folders. BlueStep™ has also adopted this name for clarity and ease of identification.

Web Folders may only be used with operating systems and programs that have WebDAV support. These include Windows™ 98/2000/NT/ME/XP and Microsoft Office 2000™ (including later versions). Mac OS X™, Goliath™ for Mac OS 8.1, WebDrive™, Adobe GoLive™, Macromedia Dreamweaver™ and many others also support WebDAV.

Web Folder Functions

Web Folders provide several distinct advantages and valuable benefits, including:

- Drag-and-Drop functionality between user's computer and online shared files
- Multiple uploads and downloads of files and folders
- File and folder locking to prevent simultaneous updates by multiple users
- Easy availability and integration with the user's desktop
- Same online username/password for Web Folder access as for BlueStep access
- No need to use a browser for direct access of online files*

There are some advanced file and folder functions within Team™, Connect™ and HQ™ that only BlueStep sites support. You will still need to use a browser to perform these functions.

Any file may be posted though an online browse-and-upload procedure. Using WebDAV, any file or folder may be added to Shared Files, accessed, moved, edited and deleted using a drag-and-drop method (or other standard keyboard cut-and-paste technique). You may use either method (browser-based or desktop) at any time to perform these functions - using one does not preclude using the other when it is more convenient to do so.

Creating Web Folders

Users of BlueStep™ products may have access to one or many Shared Files, depending upon the number of Teams, Connect™ sites or HQ™ systems available through their organizations. For each Shared File you would like to have available on your desktop, you will need to create a Web Folder. Once a folder is created for a specific Shared File page, you need never do so again. The Web Folders will be available on your desktop (or other area in your file system) and continue to reflect the current state of the online Shared Files unless you disconnect the folders.

At the bottom of each Shared Files page in BlueStep™, you will see a link Instructions for Accessing via Web Folders (WebDAV). Open this link and find the instructions that apply to the system you are using. Instructions are included for Windows 2000, XP, 98, NT, Mac OS X, Mac OS 8.1 or Dreamweaver.

Any operating system may be configured in a variety of ways on any given computer. We have made every effort to offer instructions that are specific, yet point you in the correct direction should your OS vary from the usual set up. The important item in the instructions is the link (beginning with "http…). Please be sure to copy-and-paste or type it into the appropriate field *exactly* as shown, excluding quotation marks.

Using Web Folders

Once you have created a desktop Web Folder (instructions include adding a folder shortcut to your desktop in most cases, but you may place it anywhere desired in your file system), you may open it and use any of several methods to add, delete or move files, including drag-and-drop, Ctrl C/Ctrl V, etc. Any actions that you take in the desktop folders will also occur within the Team™, Connect™ or HQ™ Shared Files pages.

As noted above, there are some advanced file and folder functions within Team™, Connect™ and HQ™ that only BlueStep sites support. You will still need to access the Shared Files pages online in order to perform these functions. They include: setting file and folder permissions and overriding a file lock. Most WebDAV clients (Windows, GoLive, etc.) will also not allow you to create a slideshow or use advanced locking capabilities. You will need to explore the capabilities of your specific WebDAV client and its configuration to determine which features are available to you, as they are not exclusive to BlueStep and not controlled by our Web Folders interface.

Securing Web Folders

As with all BlueStep™ products, security is one of the prime concerns. All permissions and locks available on the standard Shared Files pages are in force in the Web Folders. For instance, online Shared Files that you do not have permission to edit will still be unavailable for editing when contained in the Web Folder. Any folders that are locked in Shared Files will still be locked in the Web Folder. Conversely, any permissions you have been granted to the files/folders in Shared Files will also be fully granted in Web Folders.

If at any time you receive an on-screen message stating that you may not perform a particular function with a file/folder in a Web Folder or if a Web Folder function fails to operate, go directly to the website version of Shared Files where the file/folder is contained and check 1) the locked/unlocked status of the item and 2) the permissions associated with that specific item.

Following the on-screen instructions and information, as well as requesting that an administrator from your organization edit the permissions, will usually resolve any restrictions you have encountered.

File Moving

You may wish to move a file from one folder to another. This is accomplished either through Web Folders, as described above in **WevDAV and Web Folders**, or the Shared Files screen through online functions.

On the Shared Files screen, start by clicking the edit icon associated with the file. In the resulting pop-up window, click the drop-down for File Location. All folders in the Shared Files system will appear and you can select the new location for the file. Click the Save button when you are satisfied with the selection.

In some cases, you may receive the error message Duplicate name: _____. Please choose another name or location for this file. This is caused by attempting to move a file into a folder containing an existing file of the same name. To correct this, either change the name of the folder or move it to another folder where there will be no naming conflict.

File and Folder Reordering

You may change the order in which files and folders appear on the Shared Files tree. Any document that you post will become the last file in its selected folder. Any folder you create will become the last folder in the root folder or the last sub-folder within an existing folder. You can move folders into any order and move their contents into any order by using the two reorder icons .

The reorder files icon will appear to the right of all folders on your Shared Files tree. Click it for a pop-up window displaying any documents/graphics that are in that folder, along with the movement function keys. If there are no files inside this folder, the pop-up will be blank. In that case, either there is nothing in the folder at all or the folder only contains other folders.
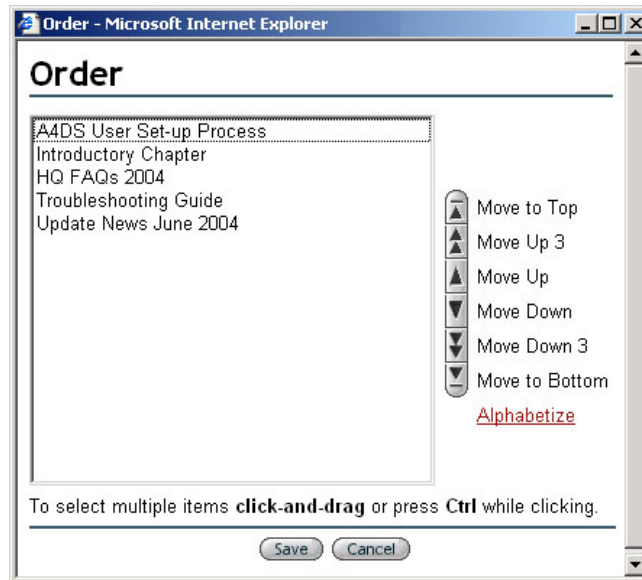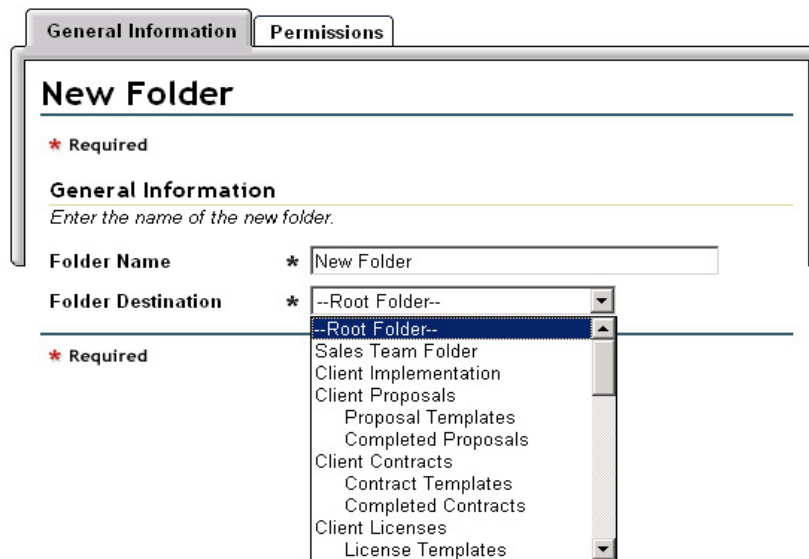
The **reorder folder** icon will appear to the right of all folders on your Shared Files tree. Click it for a pop-up that contains the list of all folders, along with the movement function keys. If there are no folders inside this folder, the pop-up will be empty. In this case, either there is nothing in the folder at all or the folder only contains files.

The reorder folder function is particularly useful in the case of the icon associated with the root folder. Using it will reorder the main folders in your system to a format that is meaningful to you and your organization.

Editing Files

The edit icon may be used to edit any file, assuming you have the correct permissions to perform that function for the specific file. The edit icon opens a pop-up window very similar to the New File screen, on which you can rename the file, change its location (to the root folder or any other existing folder) or provide a different file description. See the example below and also see **Adding Files**, below, for comparison.

*Editing files from the edit icon **does not** allow you to change the content of the file.* To edit content, open the file and save it to a local drive on your computer. Open it from the local drive and make any editing changes desired.

In some cases, you may receive the error message Duplicate name: _____. Please choose another name or location for this file. This is caused by one of two (2) operations:

> Attempting to **rename** a file of the same name as an existing file in the current folder

> Attempting to **move** a file into a folder containing an existing file of the same name

To correct this, either change the name of the file or move it to another folder where there will be no naming conflict.

New Files and Folders

New files and folders may be added to Shared Files through either the Web Folders application, as discussed above, or the Shared Files screen through online functions.

The Shared Files page always contains a root folder, created when the site was configured for your organization. Any other files and folders that appear on the page have been added to the root by administrators or by users in the organization who have the proper permissions. Whether you are an administrator who is initially creating the folders/files for the Shared Files page or a user adding new files to an existing Shared Files tree, the same process is used to build and populate Shared Files.

Adding Folders
To effectively store files, it is most likely you will want to sort them into folders. Organization Administrators or those who are familiar with your organization and its data storage needs are usually the best qualified to decided which folders are needed and in what order they should appear.

To add a folder, click the New Folder button New Folder on the upper right. On the New Folder screen, enter a title for the folder as desired. The Folder Destination drop-down allows you to select any of the folders that exist in your Shared Files tree as a destination for the new folder. If there have been no other folders created, only the Root Folder will show in the drop-down. If you want the new folder to be one of the major folders in the system, select Root Folder as its destination. If you want it to be a sub-folder of an existing folder, click on the appropriate folder name.

When done, click Save. The new folder will appear on the Shared Files tree at the bottom of the root folder or the bottom of the selected destination folder. You may reorder the folders now or at

any time in the future using the reorder icons 🖼️ 🖼️ (see **File and Folder Reordering**, above). You may also at any time rename the folder or move its destination to the root or another folder by clicking the edit icon ✏️ that appears opposite the folder name. To delete the folder entirely **and all its contents**, click the delete icon 🗑️ associated with it.
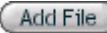
In some cases, you may receive the error message ❗ Duplicate name: _____. Please choose another name or location for this folder. This is caused by one of four (4) operations:

- ➤ Attempting to **create** a folder using the same name as an existing folder in the current folder

- ➤ Attempting to **create** a folder using the same name as an existing file

- ➤ Attempting to **rename** a folder the same name as an existing folder in the current folder

- ➤ Attempting to **move** a folder into the current folder, which contains an existing folder of the same name

To correct this, either change the name of the folder or move it to another folder where there will be no naming conflict.

Adding Files
Once any necessary folders have been created, you may upload files to store in them. Any files you wish to add to Shared Files must exist somewhere on your computer, on a CD in your CD drive, on a floppy disk inserted in your floppy drive or accessible through network connections.

Click the Add File button ⬚Add File⬚ at the upper right of the Shared Files screen. On the New File screen, seen below, click the Browse button. This will open a pop-up window displaying files, folders, drives and networks on your computer, allowing you to navigate to the file you wish to upload. If the file does not exceed 20 megabytes, click on the file name, which will place it in the File to Upload field. If you choose to have the file known by a different name in Shared Files from the original name in the source, type the new name into the Rename To field.

General Information	Permissions

New File

File To Upload	C:\Documents and Settings\jwallac	Browse... (Max upload is 20 MB)
Rename To	Adi and Daddy	
File Location	Root Folder ▼	
File Description	Hospital photo	

☐ **Enable Version Control**

⬚Save⬚ ⬚Cancel⬚

The File Location drop-down displays a list of all folders in your Shared files tree. You may select any folder to contain the document or select Root Folder if the document is to be outside the created folders. In either event, the file will upload as the last item in the selected folder or the Root Folder. Enter a description in the File Description field, if desired.

If you have purchased the Version Control option, you may select to enable versioning at this point or return to this screen later to enable versioning (see **Document Versioning**, for details).

In some cases, you may receive the error message ❗ Duplicate name: _____. Please choose another name or location for this file. This is caused by one of three (3) operations:

- ➤ Attempting to **upload** a file that already exists under this name in the current folder

- ➤ Attempting to **rename** a file the same name as an existing file in the current folder

- ➤ Attempting to **move** a file into a folder containing an existing file of the same name

To correct this, either change the name of the file or move it to another file where there will be no naming conflict. Also note that folders may not be named the same as an existing file name.

File Permissions

By default, file security is inherited from the permissions set on the Shared Files screen or from higher in the organization structure. If you desire to set security for this specific file separate from other files, click the Permissions tab. On the resulting screen you may choose from any of five (5) permissions settings using the radio buttons.

Additionally, using the Add Group and/or Add User buttons allow you to provide specific access to this document for people and groups other than those listed, such as All Staff, Everyone, Relate licensees, etc., as seen above. Remember to click the Save button when done.

Click the Upload button Upload at the bottom of the screen. The maximum upload size for any file is 20 MB. Please be patient. Large files could take several minutes to complete, particularly if being pulled from a floppy disk or through a network connection.

⚠ *Please click the Upload button only once*. Clicking it more than once may result in locking your computer or crashing your system, depending upon the size of the file and the programs concurrently running.

When loaded, you may reorder the files using the reorder icons (see **File and Folder Reordering**, above). You may also at any time rename the file or move its destination to the root or another folder by clicking the edit icon that appears opposite the document name. To delete the file entirely, click the delete icon associated with it.

Multiple File Upload

If you have several files to upload at once, the Add Multiple Files button Add Multiple Files or the multiple files link Add Multiple Files will speed the process. The button is available on the upper right of the Shared Files screen. The button and link are both seen on the File Upload screen.

This screen functions similarly to the individual File Upload screen (see **Adding Files**, above), allowing you to browse your computer for the needed file, select a location and add a description. However, there is no function to enable version control for any of these files at this time. After the files have been uploaded, you may reenter the files individually from the Shared Files screen. Using the edit icon, enter the Edit File screen, then click ☐ **Enable Version Control**. See **Document Versioning**, above.

Multiple File Upload

Select the files to upload and type in a description. **Large files could take several minutes to complete.** *After your upload is finished, the next page will appear.*

Files to upload
(max upload is 20 MB for all files)

Files to upload		Location	Description
C:\Documents and Settings\jwalker\l	Browse...	Manuals ▾	Getting Started, Chapter 1
C:\Documents and Settings\jwalker\l	Browse...	Manuals ▾	Graphics
C:\Documents and Settings\jwalker\l	Browse...	Root Folder ▾	Cheat Sheet
C:\Documents and Settings\jwalker\l	Browse...	Contracts ▾	Pricing
C:\Documents and Settings\jwalker\l	Browse...	Root Folder ▾	Partners
	Browse...	Root Folder ▾	
	Browse...	Root Folder ▾	
	Browse...	Root Folder ▾	
	Browse...	Root Folder ▾	
	Browse...	Root Folder ▾	

Upload Cancel

As you are selecting the files you need (up to ten (10) at a time) verify that the megabyte total does not exceed 20 MB. If it does not, click the Upload button at the bottom of the screen. Please be patient. Large files could take several minutes to complete, particularly if being pulled from a floppy disk or through a network connection.

⚠ *Please click the Upload button only once*. Clicking it more than that may result in locking your computer or crashing your system, depending upon the size of the file and the programs concurrently running.

When loaded, you may reorder any individually files using the reorder icons 🔄 🔄 (see **File and Folder Reordering**, above). You may also at any time rename the files or move the destination to the root or another folder by clicking the edit icon ✎ that appears opposite each file name. As above, you may also enable version control from the Edit File screen. To delete a file entirely, click the delete icon 🗑 associated with it.

Icon Format, Creator and Date Display *

The Administrator* has the option of configuring the Shared Files page to display in a graphic (Icon) format rather than the default (List) format. However, all of the functionality remains the same; the page is simply displayed in a different layout. Additionally, options are available to hide or show the document creator's name or his username, and to remove or display the document date.

If you have been designated an Administrator*, the Edit Page button will be visible to you on the upper right of the Shared Files screen. When clicked, the General Information screen will appear.

* Connect™ and HQ™ administrators have access to the Edit Page button and may make these selections whenever desired. Administrators using BlueStep's Team™ product do not have the Edit Page option. However, Team administrators may have icon, creator and date formats changed (as described above) on Shared Files, Discussions and News pages by requesting BlueStep™ to adjust the software code for their specified Team(s).

Created By

You may choose to have the names of the persons who have created documents displayed along with the document, to have them identified by username or identification hidden entirely. Selecting Display Nothing eliminates the Posted By column on the List view and the Posted By line in the Icon view and its data from the screen.

Date

Selecting the Show radio button will display the date that the document was posted. Selecting Hide removes the date column on the List view and the date line in the Icon view and its data from the screen.

View Type

You also have the option of selecting the List view or the Icon view from the View Type drop-down, which alters the layout of the main Shared Files page.

The Icon view defaults to display each folder in the root folder as a graphic, with the function icons (slideshow, lock, reorder, edit and delete) seen below. Any files that exist in the root folder have the slideshow, version, lock, edit and delete function icons shown below. To view the contents of a different folder, click the View drop-down. In the example below, Contracts and Images are also available to view.

If you mouse over any document within any folder, the information shown on the Shared Files List view (file name, file size, name of the posting individual, last date the file was modified and file description) becomes available, as shown in the small yellow box below.
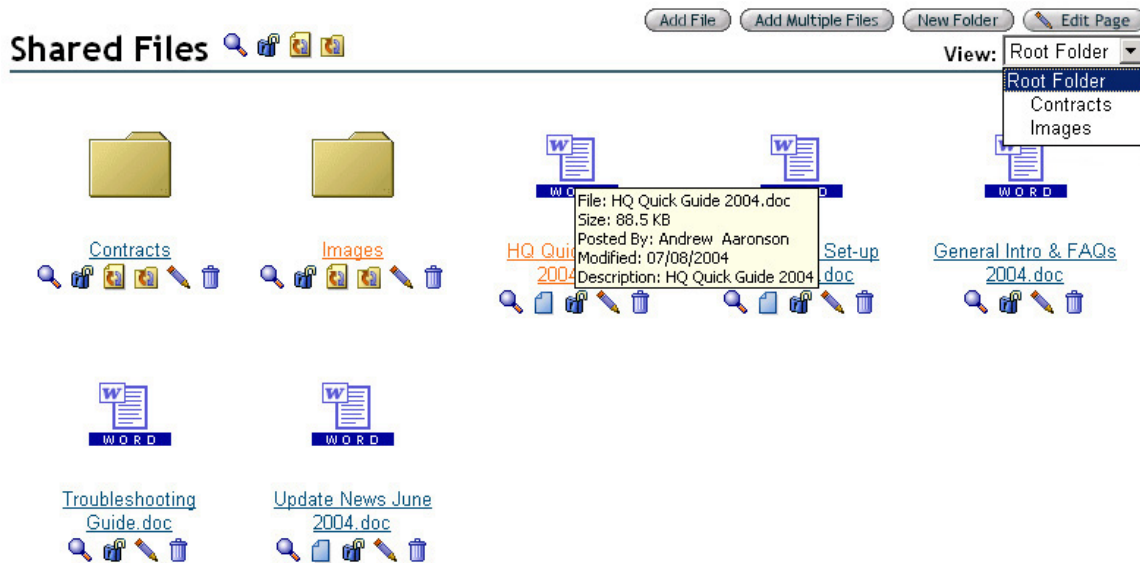
The Icon view is particularly valuable if you have many images stored in a Shared Files folder. Nearly any graphic, audio or video file will be supported in Shared Files, depending upon the current support inherent in the version of Internet Explorer™ (or other browser) that you or your organization are using. Presently gif, jpeg, png, pdf, Flash, avi, mpeg, midi, wave, mp3, zip, exe (for downloads) and others are storable and supported on the pages.
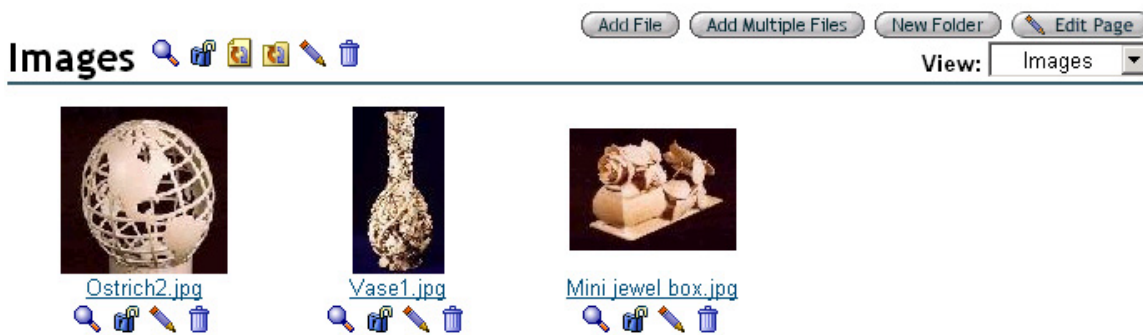
These will appear as thumbnail images, rather than icons, when the folder in which they are contained is opened, and include the function icons, slideshow, lock, edit and delete.

Linking Files

One of the benefits of storing files in the Shared Files system is the ability to make these items individually available from any selected spot within a Connect™ site. You may create a customized link to any document that is stored in Shared Files using the BlueStep Editor Box. (See the Editor Box summary, below.)

On any page where site content can be inserted using the Editor Box, seen below, you may also use it to insert the text or graphics that becomes the link to the selected Shared Files item.
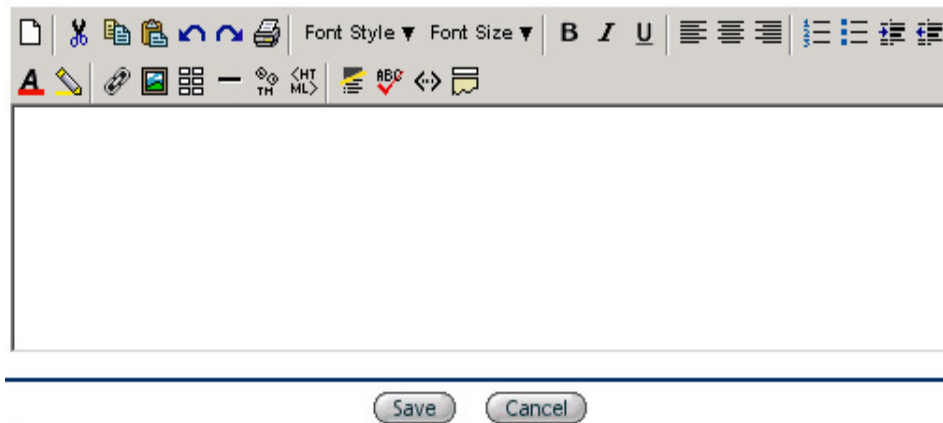
The Editor Box is usually accessed through an Edit Page button. However, each Connect™ page type has a slightly different access method and procedure, as is appropriate for that page. For example, on composite pages, you should select the View Mode button, then Content Source (choosing HTML/Text), then Customize Content, in order to reach the screen displaying the Editor Box.

Once you have located the Editor Box on the site, page or pagelet where you wish to have the link posted, enter the desired link text by typing in the box. Select any text modifications, such as colors , alignment , etc. If you are using a graphic, be sure it is loaded in the Media Library, then insert it in the editor box using the picture icon .
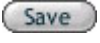
Navigate to the Shared Files page and locate the file to which you wish to create a link. Right click on the underlined name of the file to open the menu seen below.
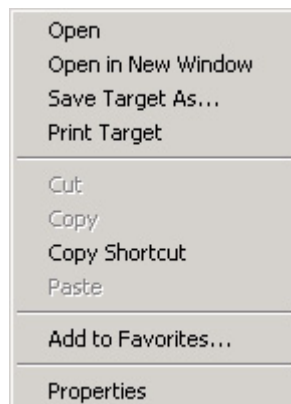
Click the Copy Shortcut selection, then navigate back to the page where you have entered the link text or graphic in the editor box. With the cursor, highlight the text or graphic that you desire

to be the link. With the highlight still active, click the link icon 🔗 in the editor box heading. In the resulting window, paste the copied shortcut into the URL field, as seen in the example below. Click the OK button.
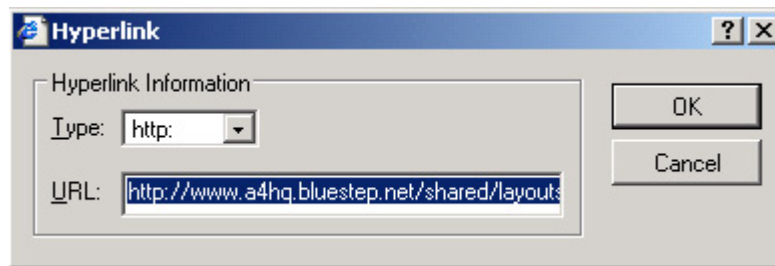
If the selected link is text, it will now appear underlined, indicating that it is an active, 'clickable' link. If the selected link is a graphic, it will now appear with a narrow outline, also indicating that it is an active, 'clickable' link.

Remember to click the Save button ⬭Save⬭ that appears just below the editor box in the current window. If you fail to click Save, the linking edits you have made will be erased. The screen will repaint with the current page displayed. You may check the link by clicking on the underlined text or outlined graphic.

📂 The Editor Box

The BlueStep™ editor box was created to allow Connect™ and HQ™ users exceptional flexibility in adding text, tables, graphics and hyperlinks to your sites and pages. Each editor has a header displaying tool icons, providing access to functions similar to those offered by traditional word processing programs.

Additionally, you may cut-and-paste from standard word processing programs (such as Microsoft Word™, Corel WordPerfect™, etc.) and web pages. Pasting copied content into the editor preserves the formatting from the original source, as allowed by your page layout.

🗋	Clears the entire contents of the editor box
✂	Cuts the highlighted/selected text
📋	Copies the highlighted/selected text
📋	Pastes the cut or copied text into the place indicated by cursor position
↶ ↷	Left arrow undoes the previous edit, right arrow redoes the previous edit
🖨	Sends text to printer
Font Style ▼	Changes font style from selected default. Available fonts: Arial, Courier, Helvetica, Tahoma, Times New Roman, Trebuchet, Verdana, Windings
Font Size ▼	Adjusts the font sizes from size 1 to size 7
B I U	Bolds, italicizes or underlines the highlighted/selected text
≡ ≡ ≡	Aligns text to left margin edge, center or right margin edge
≣ ≣	Creates a numbered list or a bulleted list
⇥ ⇤	Increases or decreases the indent in text
A	Colors the selected font using any of 54 web-safe colors or a hexadecimal code
✎	Highlights the selected text using 54 web-safe colors or a hexadecimal code
🔗	Links highlighted text to a URL. To link: Highlight a page, document or URL. Right click and copy shortcut. Highlight text in editor. Click hyperlink icon. Paste URL into address window. Click OK. If no text is highlighted, the link is inserted in the cursor position
🖼	Inserts a picture from the Media Library
—	Inserts a horizontal bar
™	Inserts symbols not found on standard keyboard, such as ™ ¢ £ § © ® ° ¶ ¼ ½ ‰ œ and others, including Latin alphabet letters formatted for foreign languages
⟨HTML⟩	Inserts raw HTML code, allowing use of shopping cart buttons and other formatting
🗐	Inserts information from the fields in single- and multi-entry forms
≣	Strips all formatting from the editor text or from highlighted text only
ABC✓	Performs a spell check
⟨·⟩	Reveals the HTML code
🗐	Opens a larger editor window

Step-by-Step in Shared Files

Adding New Files
- Click the Add File button
- Click the Browse button
- Navigate to the file you wish to add, click on its name
- Type a new name, if wish the file to be know by a different name than the source document
- Select a location from the drop-down
- Enter a file description, if desired
- Check Enable Version Control, if desired (only available if this option has been purchased)
- Click the Upload button and be patient

Enabling and Using Document Versioning (Only available if your organization has purchased this option)
- From the Shared Files screen, click the Add File button or select an existing file from the list using the version or edit icon
- Check the Enable Version Control box
- Click Upload if this is a new file or click Save if this is an existing file
- Click on the underlined name of the desired file
- Save to your computer
- Make any edits necessary, then save the document on your computer
- Navigate to the Shared Files screen
- Click the edit icon for the document you are working with
- Click the Browse button
- Select the edited file, then click Upload

Icon Format
- Click the Edit Page button
- Select List or Icon from the View Type drop-down
- Check or uncheck Show Posted By
- Click Save when done

Linking Files
- Locate the editor box where you wish to place the file link
- Type in the link text or enter the link graphic from the Media Library using the picture icon
- Navigate to the Shared Files page
- Right click on the underlined name of the desired file
- Select 'Copy Shortcut' from the menu
- Navigate back to the editor box on the selected page
- Highlight the link text or graphic
- Click the hyperlink icon from the editor box heading
- Paste the copied shortcut into the URL field
- Click the OK button
- Click the Save button