

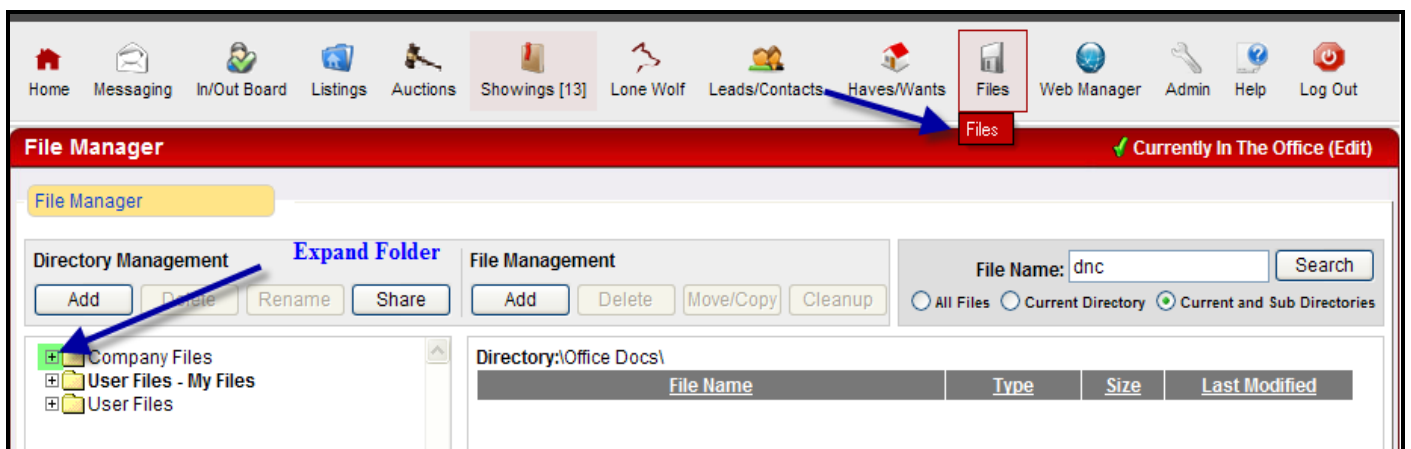


# File Manager

The File Manager is available for users to upload, store and share commonly used Company Files and User Files. *Please remember to backup the original files; the File Manager simply holds a copy of your files.*

## Accessing Files from the File Manager

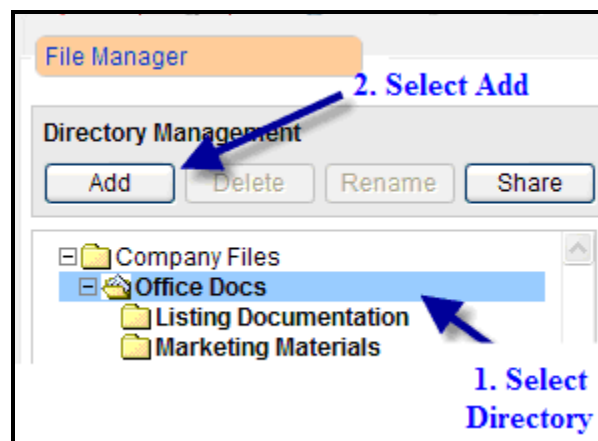
1. To access the File Manager, go to the Files icon and select Files.
2. Under Directory Management, to the left you will see the available directories listed. The main folders are Company Files, My Files and User Files. The ability to Read only, Add to, or fully Access the folders is dependent upon the permission set for the folder.
3. Click on the “+” sign to expand a folder and view its’ contents.



4. Above your listed directories, the right side of the screen will display the files that are accessible. Click onto the file to open it. You can then save the file to your own computer.

## Creating Sub-Directories within the File Manager

1. Select the directory under which you want to create your sub-directory.
2. Click the Add button in the Directory Management section.



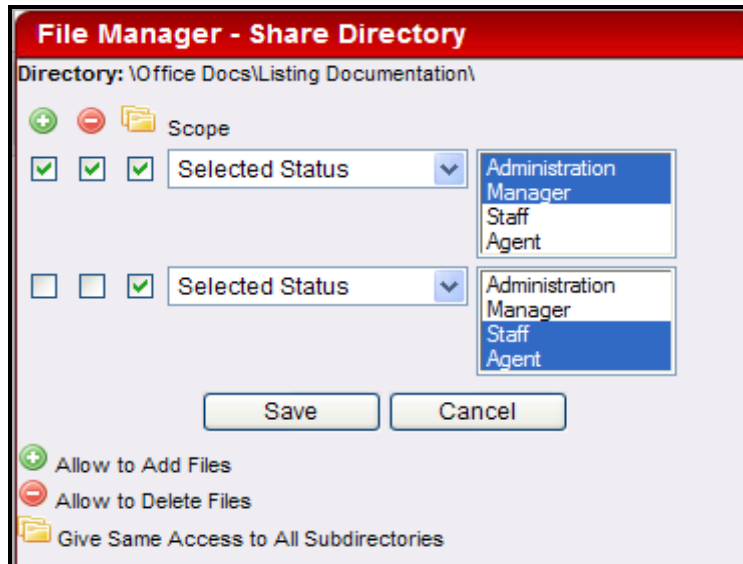
3. Enter the new directory name and click Save.

### Sharing Access to Directories or Sub-Directories:

1. Select the Directory or Sub-Directory.
2. Select the Share button in the Directory Management section.



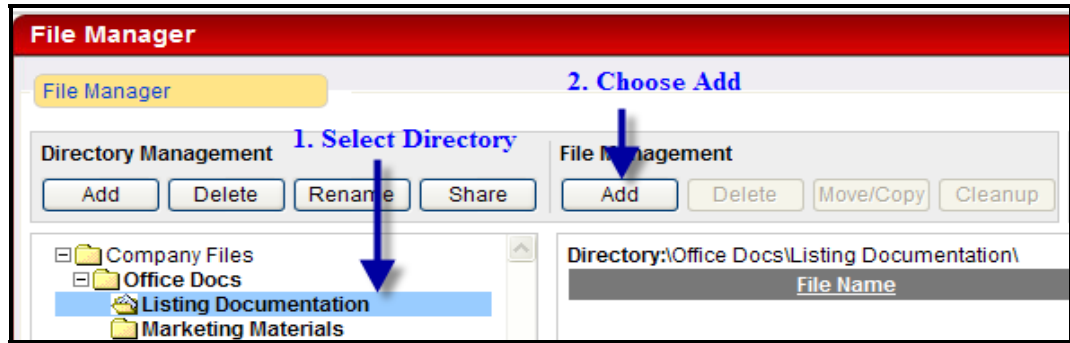
3. Decide which users will have access to add files, delete files or access the sub-directories. The example below shows that users with Administrative or Management status have full access. This allows them to add files, delete files and access the sub-directories, however, the Staff and Agents can only access the files and sub directory files.



### Adding Files to the File Manager

Your ability to add files to folders will be dependent on permissions set for the folder, however all users will be able to upload to their personal "My Files" folder.

1. Select the directory in which you wish to upload your file.
2. In the File Management section, choose Add.



3. Browse your computer to locate and select the file you wish to upload.
4. Click the Save button.

### Searching for Files within the File Manager

1. For example, to search all folders within the File Manager, in the Search section click on the All Files button.
2. Enter all or part of the name of the file you are looking for and press search.

