

# File Management

### **File Management**

The file management features allows you to store and share documents for easy and secure accessibility. All user roles have access to view and upload new documents.

Below are some examples of use cases:

- Sharing of completed incident forms
- Store company policies/ procedures
- Sharing of best practices
- Store training documentation

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Home	Companies	Contacts	Projects	Inspections	Incidents	Reports	Admin	Action Items	Popular	SmartW	lork
Home	Home Page						r	Action It	ems		
Inspection Type			Overview				QR code	s	y Alerts		
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## **Creating a Folder**

Administrator roles have the ability to create folders (paths). In a future enhancement, you will be able to select a folder and see items within each folder

### **Uploading Document**

Click on Upload button.

Select the Folder "path".

You have the option to Browse or Drag file. Click **Upload** to finalize the process.

The system will confirm the upload with a check mark.

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### **View a Document**

To view a document, click on the **File Name** link. This will download a copy of the file to your device. (Note: make sure to check your pop up blocker so the document will be able to open)



### **Viewing History of Document**

To view the history of a document, click on **View History** link

A pop-up window will appear with the details of who added the document.

Upload Delete	Create Folder			
	File Name	History for file		History
3471750-5689-43d6-8afa-08df.	Incident Policies.doc	Yesterday Grana CREATED /Safary Diaming	nsword	[view history]
10-4807a2-9500-4681-9036-bact0118ea2c	Incident Forms.doc	PM Herrera 72704b Policies/Incidents/ 0)	ord	[view history]

### **Deleting a Document**

To delete a document, click on the document field to highlight the file line and click **Delete**.

The file will immediately delete.

NOTE: There is no pop-up window asking if you are sure you want to delete.

File Management	/			
Upload Delete	Create Folder			
Id	Delete selected file(s) File Name	Path	Mime Type	History
33471750-5689-43d6-8ata-08dt5te1atb1	Incident Policies.doc	/Safety Policies/Incidents/	application/msword	[view history]
dd48b7a2-9580-4681-9d56-bad	Incident Forms.doc	/Incident Forms/	application/msword	[view history]
File Management				
Upload Delete	Create Folder			
Id	File Name	Path	Mime Type	History
33471750-5689-43d6-8ata-08dt5te1atb1	Incident Policies.doc	/Safety Policies/Incidents/	application/msword	[view history]

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