

Chainformation Admin User Guide (Files/Media)

Last Updated: March 31, 2023

Welcome to the **Chainformation** user guide. In this manual, we will learn how to upload new files, media and manage your existing files.

You can upload any file type to the **Chainformation** platform, e.g. Office files, images (Incl High Res), audio, video or any other file. However, you will not be allowed to upload executable files that can be potentially harmful to the platform.

NOTE to SUPER ADMIN: You must first make the proper settings for the **File manager - Local and Central** functions in your **system setup** to control which **Roles** in your organisation are allowed to share new files and manage existing files. [See the User Guide for Roles Administration](#)

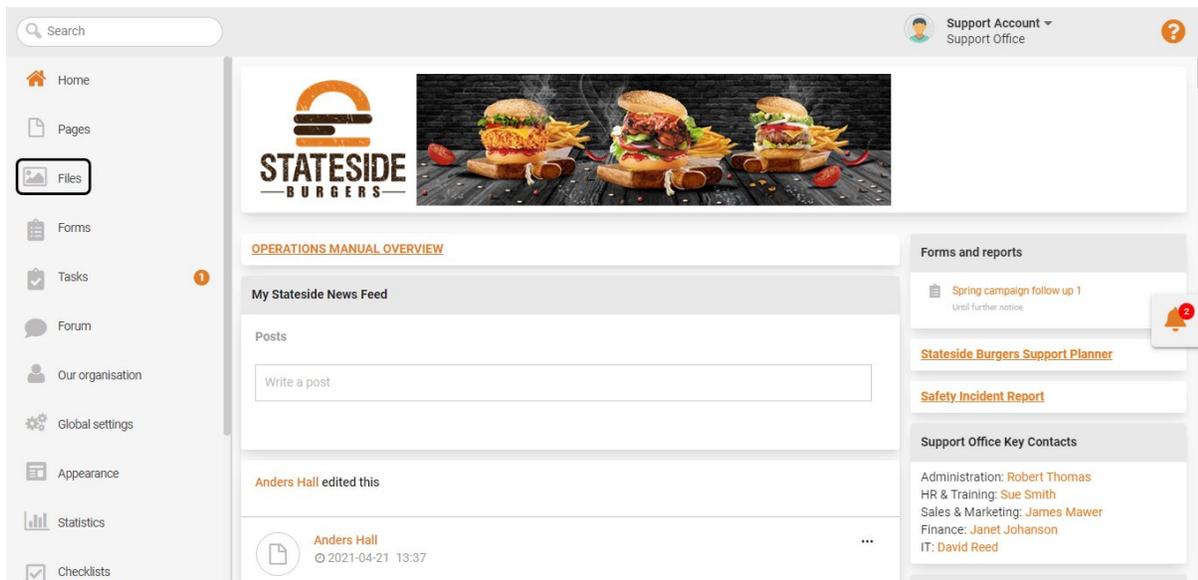
Here is a list of all the features of the **Files** page that we will discuss in this manual.

Add a New File	Fel! Inget bokmärkesnamn angivet.
Save an Attachment as a File	Fel! Inget bokmärkesnamn angivet.
Manage Existing Files	Fel! Inget bokmärkesnamn angivet.
View Existing Files	7
Review a File Content	9
Download a File	10
Comment on a File.....	10
Edit or Replace a File	11
Delete a File.....	12
Manage Files in Trash	13
Restore a Deleted File.....	13
Delete a File Permanently	13

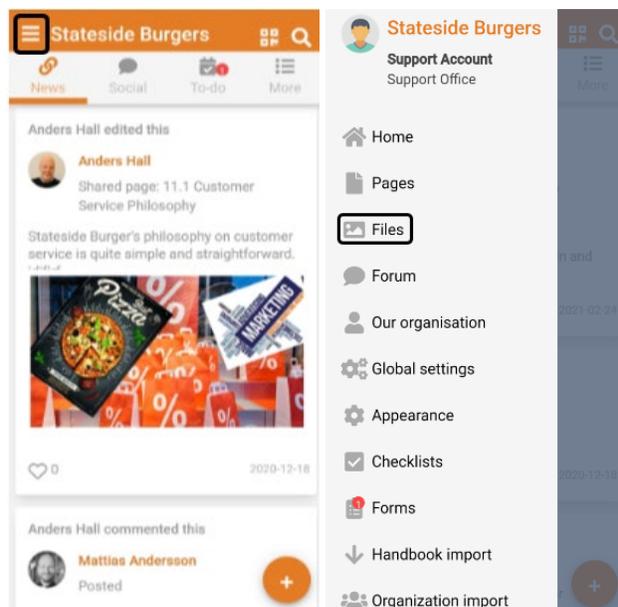
Add a New File

Once you have logged in to the **Chainformation** platform then follow these navigation steps to **add a new file**.

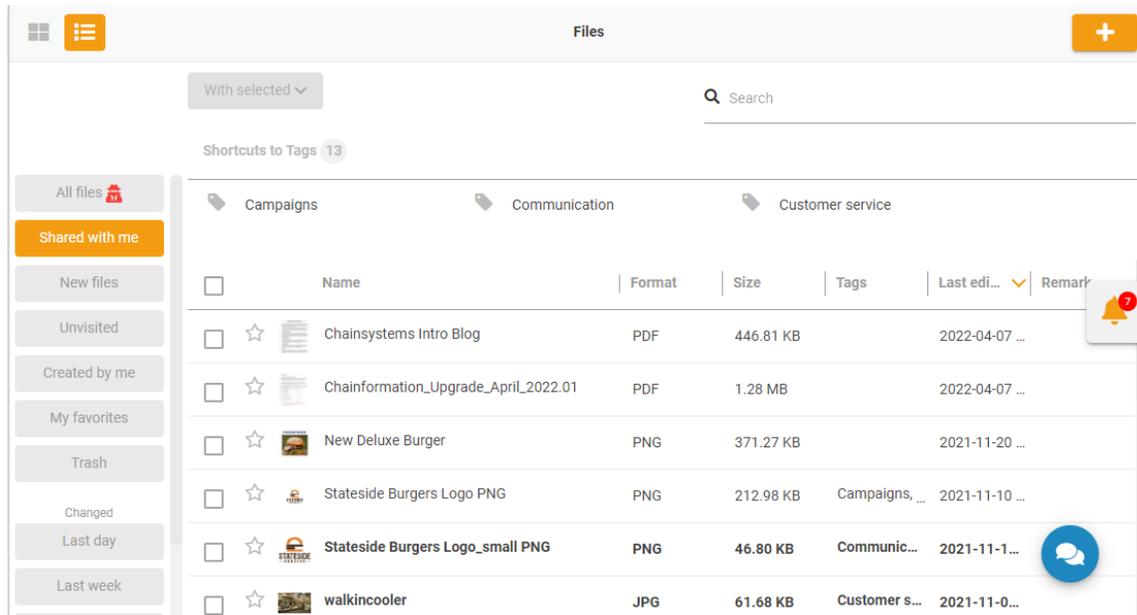
1. Click the **Files** button in the left-side menu to open the **Files** page.



If you are accessing the platform from the **Chainformation** mobile app, you can open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.

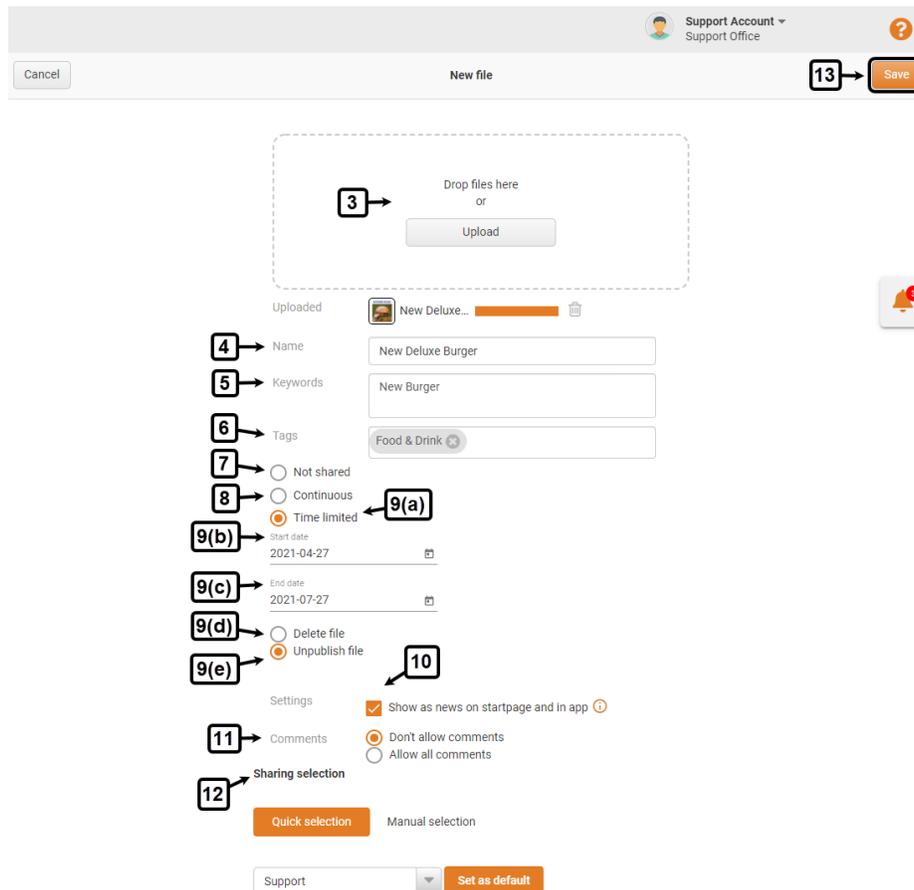


2. Click the **(+)** icon in the top-right corner of the **Files** page to add a new file.



This will open the **New file** page.

On the **New file** page, follow the navigation steps demonstrated below to add a new file.



3. Upload or drop a file.

Note: You can also add more than one file. The file size of a single file or the sum of multiple files should not exceed 800MB/upload sequence.

4. Enter a **Name** of the new file.

Normally your files keep their original source names. However, you can also enter a file name different from its local source.

5. Enter one or more **Keywords** to attach with the file to use for the **Search** feature. See the User Guide for Search

Note: For files with readable text content like Word, Txt, Excel, PDF, PowerPoint etc., **Chainformation** will index ALL text within those files and make it searchable, so there is normally no need for specific search words.

6. Select one or more **Tags** to which you want to associate the new file. See the User Guide for Tags

7. Select the **Not shared** option if you want to upload the file for your personal use only and do not want to share the new file with any other user in your organisation.

8. If you want to share the file with your colleagues, select the **Continues** option and set a **Start date** when the file will be available to the selected users in your organisation.

9(a). If you want to share the file with your colleagues for a definite period, select the **Time limited** option.

9(b). Set a **Start date** when the file will be available to the selected users in your organisation.

9(c). Set an **End date** when the file will be no longer available to the selected users in your organisation.

9(d). Select the **Delete file** option if you want to delete the file after the **End date**.

9(e). Select the **Unpublish file** if you want to only archive the file after the **End date** and do not want to delete it.

10. Check the checkbox next to the **Show as news on startpage and in app** option in the **Settings** field if you want to share the file as a news update on the start page and as a notification in the mobile app for the selected users.

11. Select an appropriate option in the **Comments** field if you want to allow comments on the file or not.

- Selected users can comment on the file if you select the **Allow all comments** option.
- No user can comment on the file if you select the **Don't allow comments** option.

12. Select a **Sharing selection** for who should have access to the new file. [See the User Guide for Sharing Selection](#)

Note: A Sharing selection will be effective only if you have selected the **Continuous** or **Time limited** option.

If you have selected the **Not Shared** option, then the file will be shared with no other users in your organisation regardless of the sharing options you have selected in the **Sharing selection** field.

Once you have entered all the file details, carefully review all the information on the **New file** page.

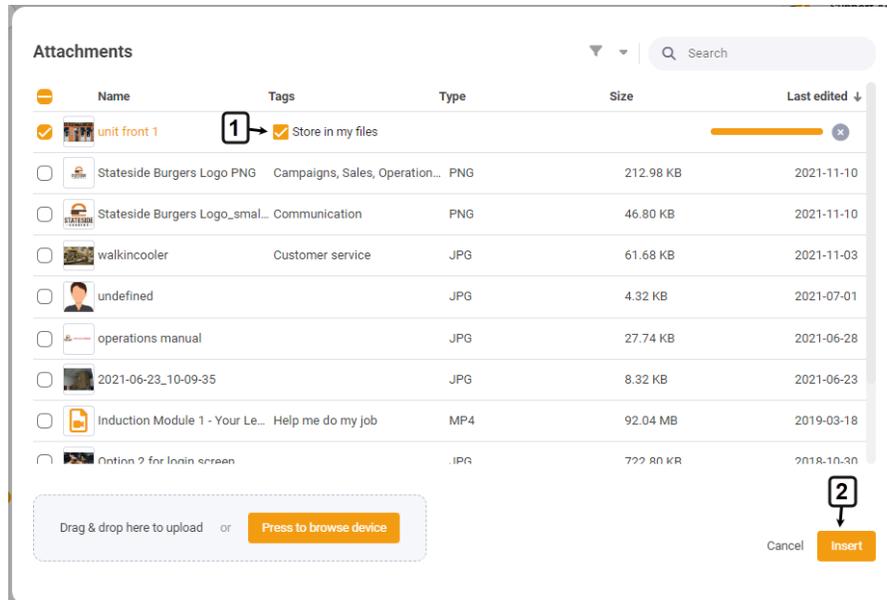
13. Enter the **Save** button in the top-right corner of the page to publish the file.

14. Once a file is uploaded it will be available to insert or link to in all other Modules across the platform.

Save an Attachment as a File

When you upload a new file to the **Chainformation** platform through the **Attachments** dialogue in any other module such as Pages, Forms, Checklists, Tasks, etc., you can choose to save the copy of the new upload in the **Files** module as well.

1. To do so, check the checkbox next to the **Store in my files** option next to the file name you have recently uploaded to the **Attachments** dialogue.
2. Then, click the **INSERT** button in the bottom-right corner of the **Attachments** dialog box to save the uploaded attachment.



Now, the system will save a copy of the uploaded attachment in the **Created by me** folder of the **Files** module along with in the module where you have uploaded it.

Remember, the system will save the selected file in the **Files** module but will not share it with other users in your organisation. However, you can share it with your selected colleagues, add keywords to it, associate it with tags and update its other settings on the **Edit file** page of the selected file. [See the User Guide for Edit a File](#)

Note: If you do not select the **Store in my files** option on the **Attachments** dialog box, then the uploaded attachment will only be saved in the relevant module. The system will not save its copy in the **Files** module and it will be deleted permanently when you delete it or the object where it has been uploaded.

For example, when you delete a page, the system will also delete all the files on the deleted page if you have not saved their copy in the **Files** module. On the other hand, if you have saved these files in the **Files** module, then you can still find these files in the **Files** module even after the page (or other relevant object) has been deleted.

Manage Existing Files

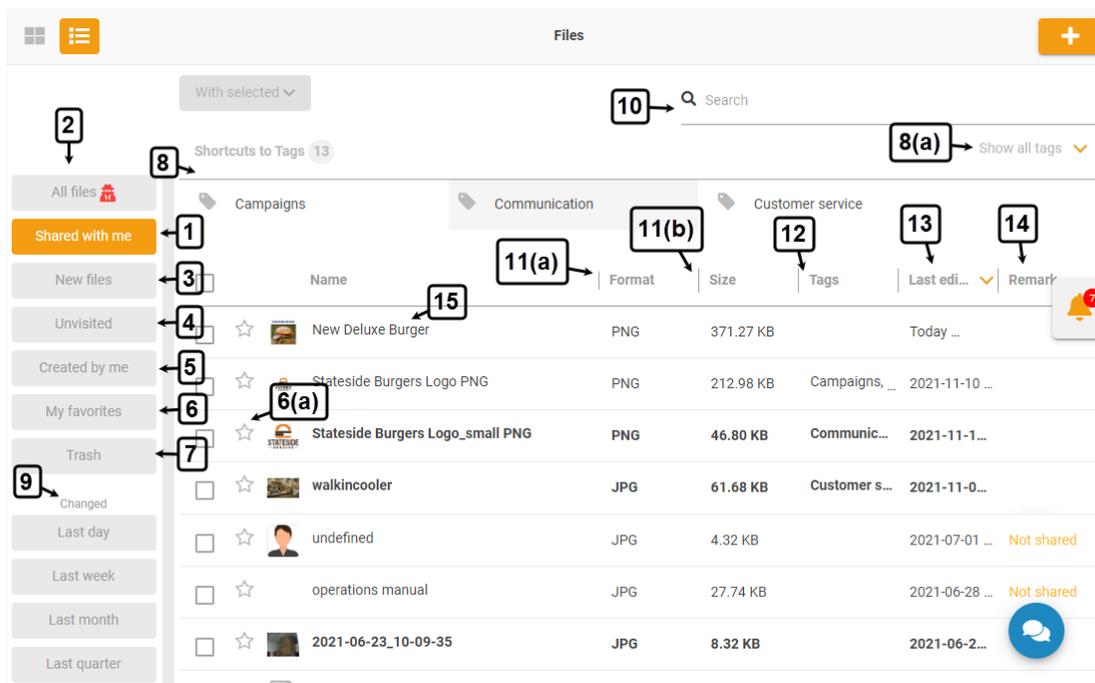
On the **Files** page, you can **view** and **manage** the files uploaded by you and your colleagues.

In this section, we will discuss the following features of the **Files** module.

- View Existing Files on the Files Page
- Review a File Content
- Download a File
- Comment on a File
- Edit or Replace a File
- Delete a File

View Existing Files

Once you have opened the **Files** page as demonstrated in the previous section, you can view different files under the following categories.



1. Shared with me

By default, you will be redirected to the **Shared with me** tab. This tab contains all the files uploaded by you and the files your colleagues have shared with you.

2. All files

Super Admin can view and manage all the files shared across your organisation's internet in the **All files** tab. As a Super Admin, you can access even those files from this tab which have not been shared with you.

Note: Only those users can access the **All files** tab who are associated with the roles which have been assigned the **Super Admin** right for the **File manager - Central** function in the **System setup** of your organisation. [See the User Guide for Roles Administration](#)

3. New files

New files tab contains the files that have been recently shared by your colleagues during your current login session.

Note: Files in the **New files** tab will be removed from this tab as soon as you end the current session i.e. log out from the **Chainformation** platform.

However, you can still access these files from the other relevant tabs in the **Files** module.

4. Unvisited

Unvisited tab contains all the files which are available to you in the **Files** module and you have not visited them yet.

These files will be removed from the **Unvisited** tab as soon as you visit them. However, you can still access them from the other relevant tabs in the **Files** module.

5. Created by me

Created by me tab contains only those files that have been uploaded by you.

6. My favorites

My favorites tab contains the files that you have marked as favorites.

6(a) **Note:** You can **mark/unmark** a file as **favorite** by clicking the **Star** icon next to its name on the **Files** page.

7. Trash

Trash folder contains the files that have been deleted by you or your colleagues from the **Files** module. [See the User Guide for Trash](#)

8. View Files based on Their Tags

On the **Files** page, you can also view files based on the tags to which these files are attached. Different tags of the **Files** module are available under the **Shortcuts to Tags** heading at the top of the **Files** page. See the User Guide for Tags

By default, only a limited number of tags are shown under the **Shortcuts to Tags** heading. You can view all the available tags by clicking the **Show all tags** button.

9. View Files based on the Edit History

On the Files page, you can also view files based on their edit history i.e. when they were last edited. **Chainformation** categorise all files on the **Files** page under the following four periods:

- i. Last day
- ii. Last week
- iii. Last month
- iv. Last quarter (3 months)

You can access these categories under the **Changed** heading in the left-side menu of the **Files** page.

10. Search a File

You can also use the **Search** field to find a file based on any of the available data/information. See the User Guide for Search

11. You can view the format and size of all the files listed on the **Files** page under the Format and Size headings respectively.

12. Under the **Tags** heading, you can view the tags associated with all the files listed under different categories on the **Files** page.

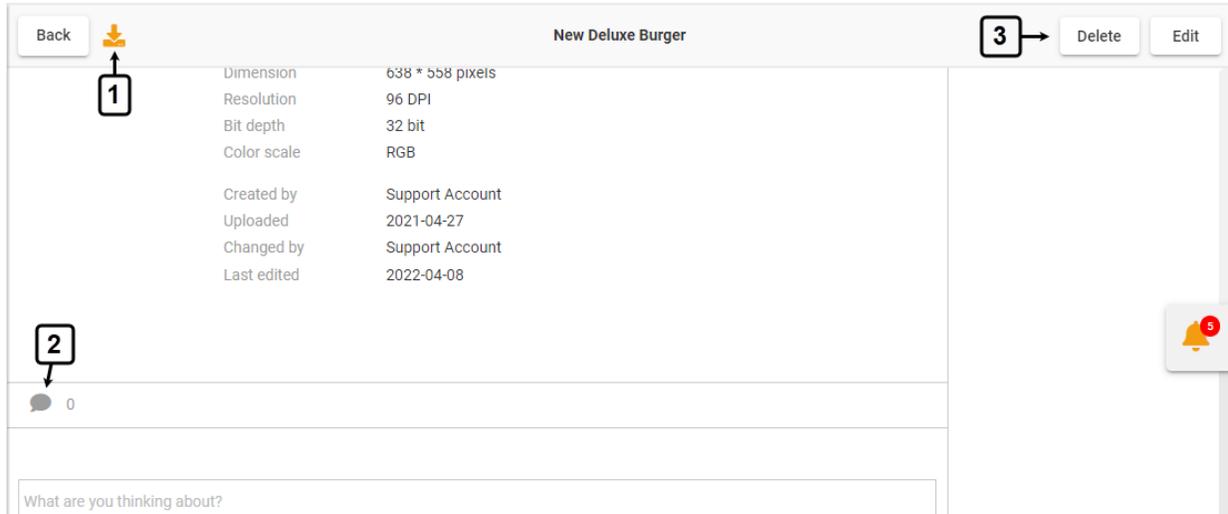
13. Under the **Last edited** heading, you can view when and who has last edited a particular file.

14. Under the **Remarks** heading, you can view any additional information available for a file such as it is **not shared, in trash**, etc.

Review a File Content

15. You can review the content of a file by clicking its name on the **Files** page.

This will open the **Details** tab of the selected file where you can view its content, add comments to it (if applicable) and download it.



New Deluxe Burger	
Dimension	638 * 558 pixels
Resolution	96 DPI
Bit depth	32 bit
Color scale	RGB
Created by	Support Account
Uploaded	2021-04-27
Changed by	Support Account
Last edited	2022-04-08

0

What are you thinking about?

Download a File

1. You can also download a file from the **Files** page to your computer or mobile phone. Click the **Download** icon on the **Details** page of a file to download it to your device.

Comment on a File

2. You can add new comments and reply to the comments of your colleagues on a file by clicking the **Chat**  icon beneath available details of this file.

Commenting on a file is similar to writing a feed post. Just like a post, you can customise your comment on a file using various typographical and attachment options. [See the User Guide for Feed Posts](#)

Note: You can add comments to a file only if the file creator has enabled the **Allow all comments** option for it. [See the User Guide for Add a New File](#)

3. You can edit or delete a file by clicking the respective buttons in the top-right corner of its **Details** tab.

Follow the navigation steps demonstrated in the following section to **edit a file**.

Edit or Replace a File

To **edit** an existing file or **replace** it with another file, click the **Edit** button in the top-right corner of its **Details** tab by following the navigation steps demonstrated earlier.

This will open the **Edit file** tab of the selected file.

1. Edit a File

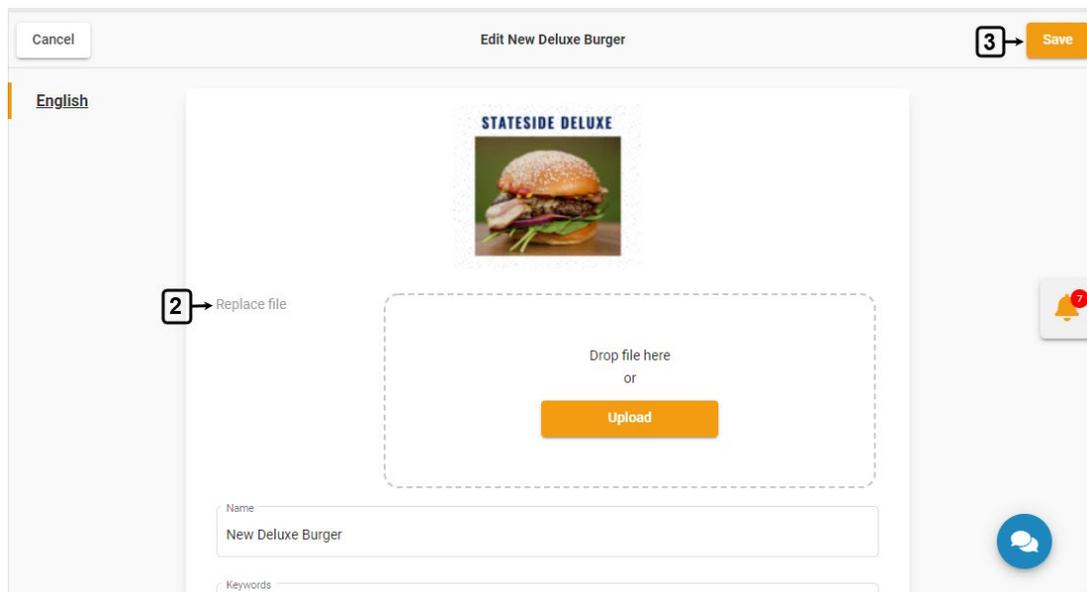
Update the details you want to edit in the selected file.

2. Replace a File

If you want to replace an existing file with a new file, navigate to the **Replace file** option on the **Edit file** page and drop or upload the new file.

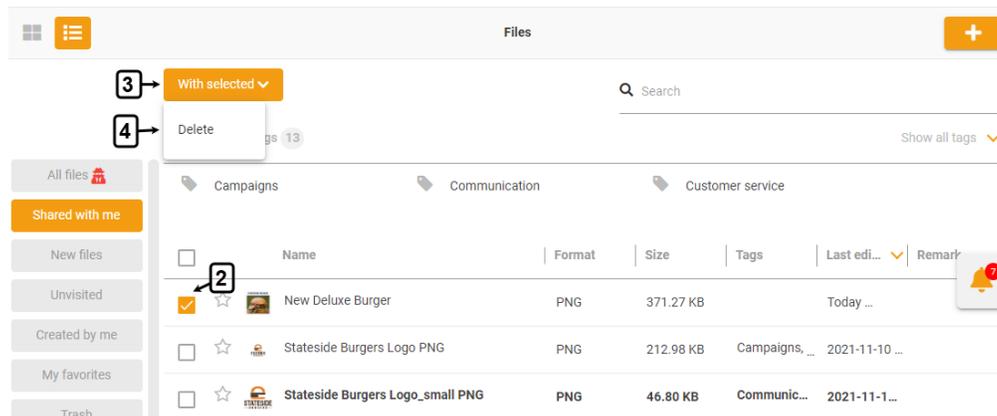
Note: If you have links to your file from other places or modules in the platform you should always replace, not delete the file. This way all relative links will be intact after your replacement.

3. Click the **Save** button in the top-right corner of the **Edit File** page to save all the changes you have made.

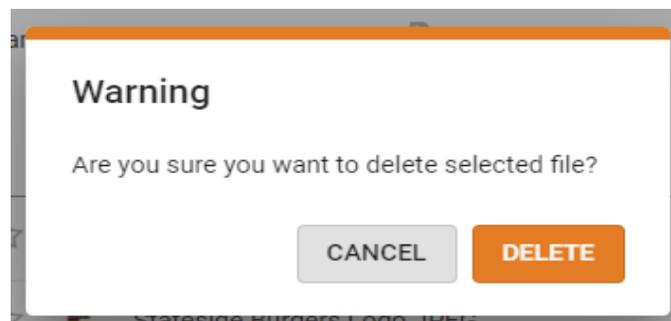


Delete a File

1. Open the **Files** page by following the navigation steps as demonstrated in the previous section.
2. On the **Pages** tab, **check the checkbox** next to the name of the file or files you want to delete.
3. Click the **With selected** button above the listed tags.
4. Click the **Delete** option from the **With selected** dropdown to delete the selected files.



5. You can also delete a file by clicking the **Delete** button in the top-right corner of the **Details** tab of the file you want to delete.
6. Click the **DELETE** button in the pop-up message shown on the screen to delete the selected file.



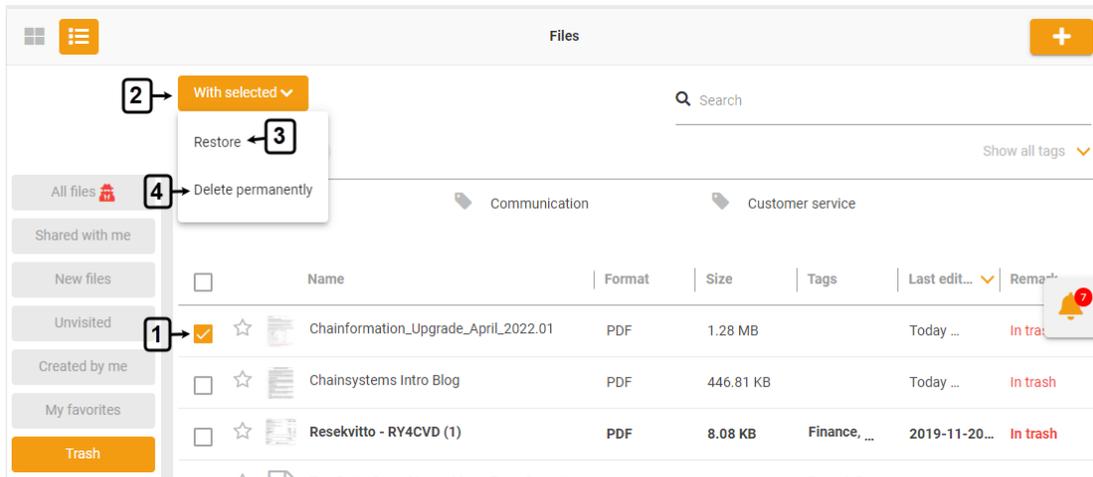
Note: When you **delete** a file, it will be moved to the **Trash** folder of the **Files** page from where you can **restore** it (if required). [See the User Guide for Trash](#)

If the file is linked to other content there will be a warning showing where the file is used. Be aware of this because the deletion can not be reversed.

Manage Files in Trash

Every **Chainformation** platform has a designated **Trash** folder for the **Files** module from where you can restore a deleted file or delete it permanently.

To **restore** a deleted file or **delete** it **permanently**, open the **Trash** folder on the **Files** page and follow the navigation steps demonstrated below.



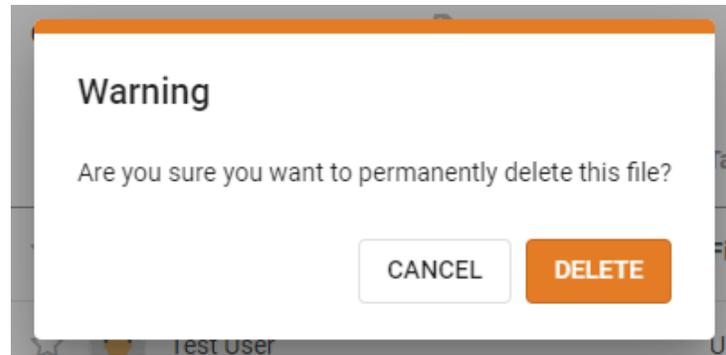
1. Check the **checkbox** next to the name of the file or files you want to restore or delete permanently.
2. Open the **More** menu provided above the listed tags.

Restore a Deleted File

3. Select the **Restore** option in the **More** menu to restore the selected files and move them back to their respective category on the **Files** page.

Delete a File Permanently

4. Select the **Delete permanently** option in the **More** menu to delete the selected files permanently.
5. Click the **DELETE** button in the pop-up message shown on the screen to confirm your action.



Remember, you cannot retrieve a file once you have deleted it permanently from the **Trash** folder.