

Document Library

supportcenter.nc4.com/hc/en-us/articles/218189848-Document-Library

The E Team Document Library provides the means by which to add documents to your E Team system that can be shared among all users and added as an attachment to an E Team report instance using the Attachment fields.

The Document Library structure can be configured by an E Team user who is a member of the ETeam Managers or System Admin group, or has been given the permission Data_Dictionary (EDITOR).

Users who are a member of the E Team Authors, Editors, Managers, or System Admin groups, or who have been given one of the following permissions, doc_library (AUTHOR) or doc_library (EDITOR) can add documents to the library. All E Team delivered groups contain the proper permission to read library documents.

Only users in the E Team Managers and System Admin groups, or who have been given the permission doc_library (DELETE) have rights to delete library documents.

Structuring the Document Library

It is recommended that you take the time to define and create your folder structure prior to adding your first library document.

To create or edit folders or the existing folder tree structure in which to store documents:

1. Log into E Team.
2. Navigate to Data Dictionary > Keywords.
3. Locate the keyword Category, and place the document in update mode.
You will be presented with a sample folder structure as shown below. You will enter your own folder structure following this example.
Folder 1
Folder 2
Folder 2:Sub Folder 1
Folder 2:Sub Folder 1:Sub Folder A
Folder 3
4. Replace the default information with your own as instructed below:
 - Add your top level folder names.
 - Add your second level by entering the top level name followed by a colon and the second level folder name.
 - Add each subsequent level in the same manner using the full folder path with each level separated by a colon.
Ex:
Action Plan
Action Plan:Earthquake
Action Plan:Earthquake:Fire Dept
Action Plan:Earthquake:Fire Dept:Chief

5. When done submit the keyword document.

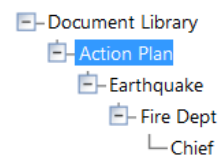
The example above will look like this in your Document Library.

If you design your folder structure outside of E Team please paste the data into notepad before copying it into the E Team keyword document.

Building Your Document Library Content

To add documents to the library.

1. Log into your E Team application.
2. Navigate to References > Document Library. The Document Library will open in a new window.
3. Click on the Add New Document button at the top right of your screen. E Team's attachments upload window opens.



Document Library Information

Optional Description

Input File (Required for new document, optional when updating)
 County Earthquake Action Plan.pdf

Category

- Earthquake
- Action Plan
- Earthquake
- Fire Dept
- Chief

4. Click Browse to open your system's standard file selection window and make your selection. The file selection window will close and the selected file name is displayed in the upload window.
5. Enter an Optional Description as needed.
6. Verify/select the library folder in which to store the document from the Category picklist provided. This will default to the folder open when you first clicked the Add New Document button.
7. Click Submit. The file will be added to the selected folder in the Document Library.

Document Library

Document Library

- Action Plan
- Earthquake**
- Fire Dept

Document Listing for Action Plan:Earthquake

Add New Document Close

Document Name	Description	Updated By	Uploaded On	Stats	
County Earthquake Action Plan.pdf	Earthquake AP	caalomon	04/14/2016 at 11:31 PDT	0	Update Delete

8. Repeat the steps above to add additional files.

Updating a Library Document

1. Navigate to and open the Document Library.
2. Locate the document listing requiring an update.
3. Click the Update button to the right of the listing.
4. Click Browse to open your system's standard file selection window.
5. Locate the updated document on your computer and select.
6. Click Submit. The updated document has now replaced the previous version.
If this document has been added as an attachment to an E Team report instance, when the attachment link is selected on that instance the updated document will be now accessed.

Deleting a Library Document

1. Navigate to and open the Document Library.
2. Locate the document listing to be deleted.
3. Click the Delete button to the right of the listing. The document will be removed.
If this document is attached to an active Team report instance (status not Blue - Report Closed) the delete option will not be visible. Once all reports using this document have been closed or deleted, the delete option will reappear.