

MAYO CLINIC



File Manager Quick Reference Guide

January 2019



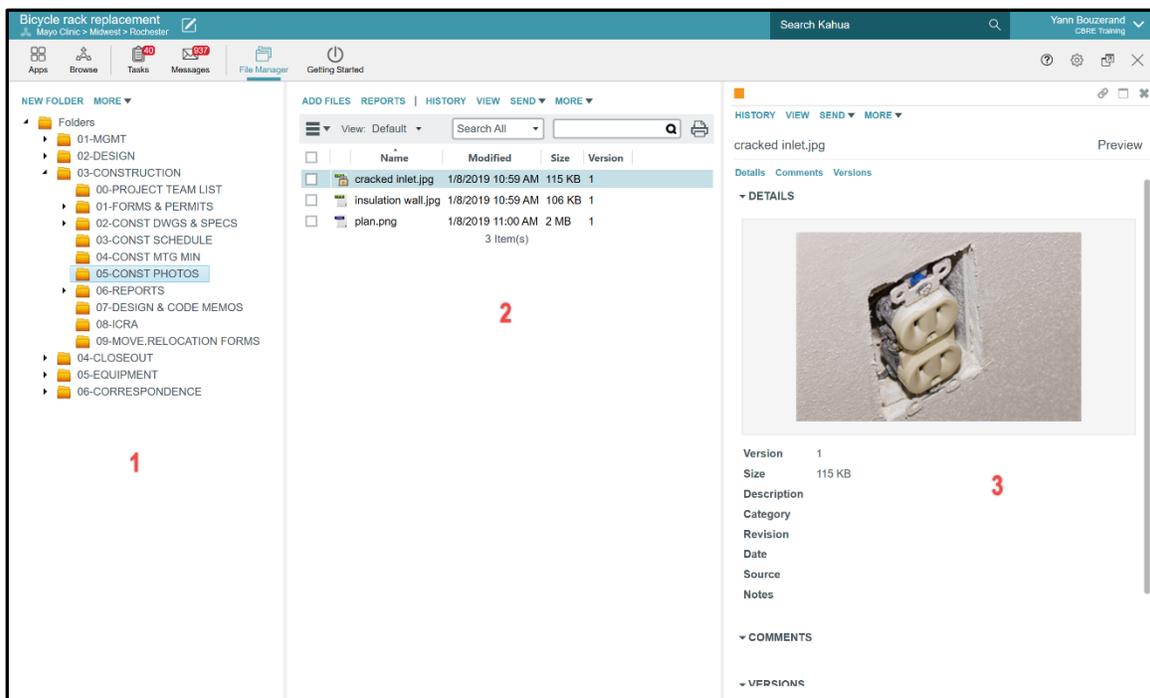
Prepared for the Mayo Clinic
Enterprise Kahua Deployment

NAVIGATION IN FILE MANAGER

To navigate in File Manager, users will make use of the left pane to navigate and further panes to drill down into further detail or access a file. See below information around how to navigate in File Manager.

1. The Folder Structure pane will be displayed on the left upon access to the File Manager application. This folder structure is where all navigation will be done (1). Note that the structure has black triangle icons to the left of each folder to drill down to sub-folders.
2. The contents of the selected Folder display in the Log in the window to the right of the Navigation pane window (2). Users will see the contents of whichever folder is selected on the furthestmost left pane displayed in this pane. Users will never ‘double-click’ on folders in this window. To navigate within a sub-folder, navigate on the left pane and the contents will display here.
3. When a specific folder or file is selected in the second pane, the Detail Pane on the far right displays the content of the current selection (3). The Detail Pane includes file metadata, including a preview of the document (if render is supported for this file type), all version information, the description and size of the file and any other pertinent information. Users may take action on a file from the Detail pane (download, lock, markup, etc.).

The Detail Pane is only visible when a selection is made in the second window. Note there are several action buttons available when a file has been selected. We will review these actions in the upcoming pages.



HOW TO NAVIGATE INTO SUB-FOLDERS

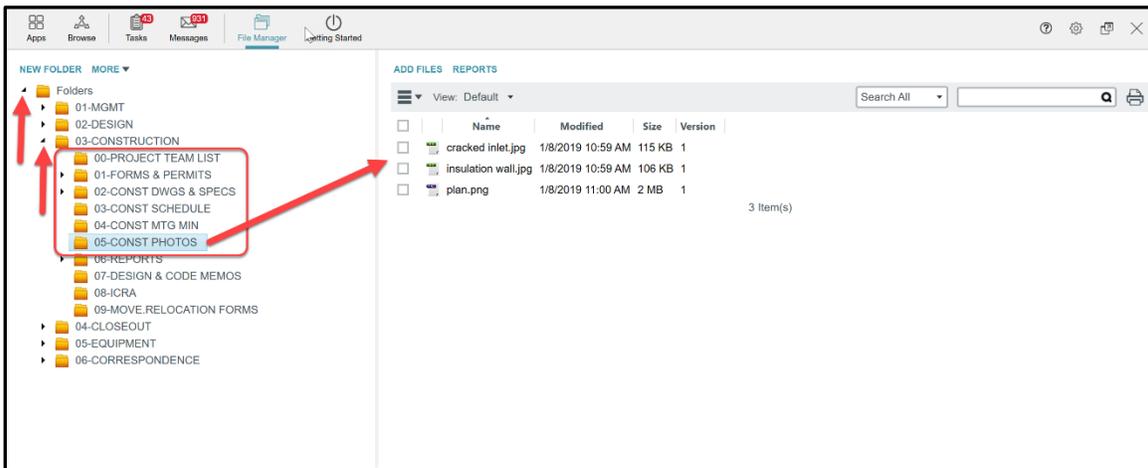
There are two ways to drill into the folder structure:

- Click the right arrow (▶) next to the folder on the far left pane. This displays the next level of folders under that folder in the Folder Structure pane.
- Single click on the folder name that you would like to 'open' or display contents of. This displays the contents of the folder in the Log pane to the right.

When a folder does not have an arrow next to it, it means that the deepest subfolder in that branch has been reached. To see the contents of that folder, click on the folder name.

In this example, contents of the "05-CONST PHOTOS" subfolder are displayed by drilling down this path using the right arrow (▶), then clicking on "05-CONST PHOTOS"

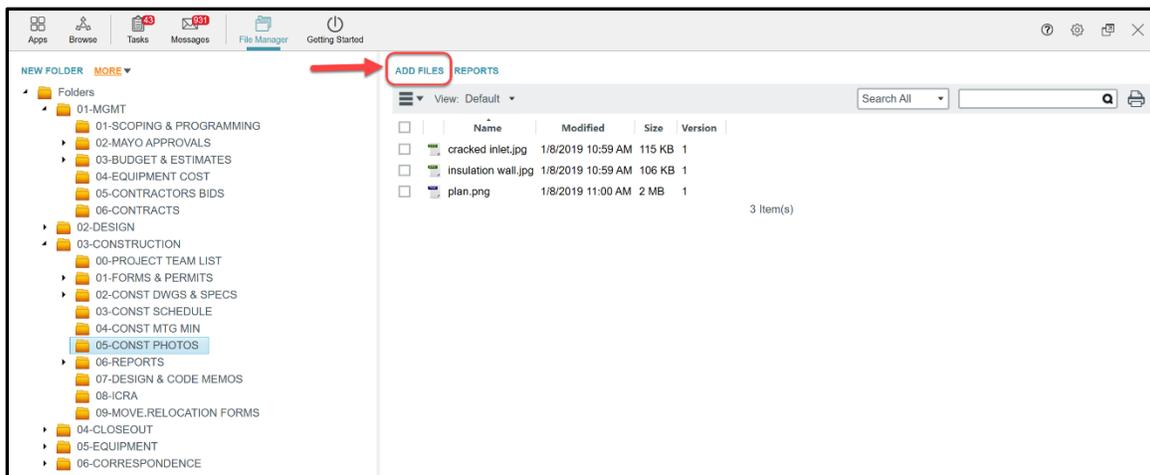
▶FOLDER ▶ 03 CONSTRUCTION and click on "05-CONST PHOTOS" to display the log.



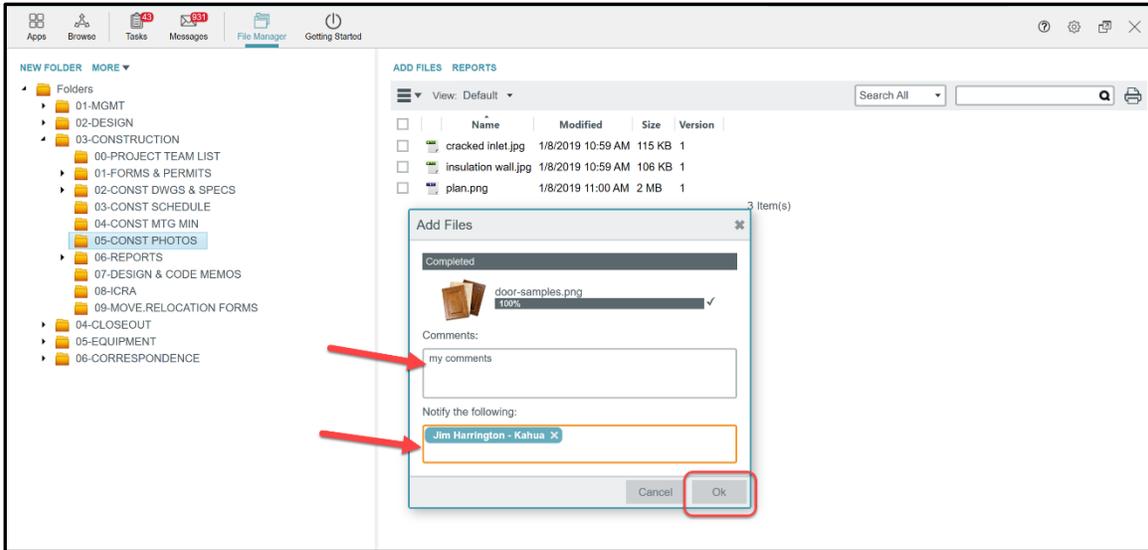
UPLOADING FILES OR INCREMENTING VERSION OF FILES

Users can upload one or multiple files to Kahua at the same time. To upload files, follow below steps. These same steps will be followed to upload a new version of an existing file.

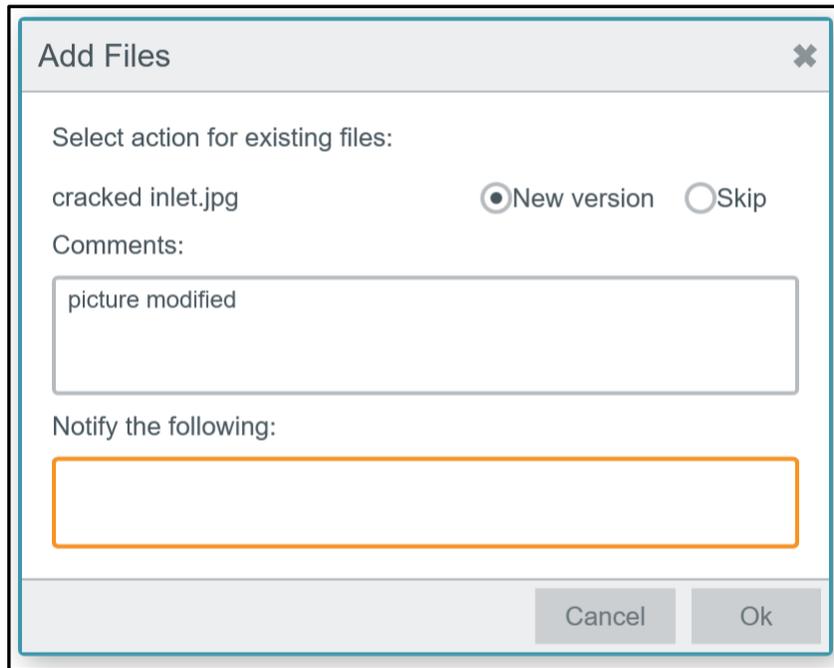
1. Navigate to the folder in the left pane that files will be uploaded to. To check you are in the correct place, ensure the right pane displays a list of files and/or folders that your file(s) should sit parallel with in the folder structure (in the same folder).
2. Click the **Add Files** button above the panes. A file selection window will open on your computer.



3. Browse to the folder containing the files to upload.
4. Select one or multiple files that you would like to upload. Click **Open** in the Windows Explorer to prompt the upload.
5. Kahua will show progress of file(s) being uploaded. The system will scan the folder you are uploading to and note if the file name already exists. If the exact file name already exists, users will be navigated through steps to increment version of an existing file. If not, users will follow traditional upload steps. See **step 5a if the file does not yet exist in Kahua**. See **step 5B if the file you are uploading already exists in the folder and you are uploading a new version**.
 - a) If the file does not yet exist in Kahua, a screen will appear requesting input of an optional comment and a list of users to notify. Kahua allows users to send a Kahua message and a link to the file in Kahua upon upload. Any comments made here will be tracked on the file's detailed information. Enter any users to notify and click **Ok**. The file will upload and appear in the folder accordingly.



- b) If the exact file name already exists in the folder you are uploading to, a window will appear with actions including 'New Version' or 'Skip.' You will keep the defaulted 'New Version' option to indicate that this is a new version of the existing document. Add any comments to be listed on the file detail and enter any users that you would like to notify of the upload. The users will receive a Kahua message indicating the file was uploaded and a link to the file in Kahua (if they have permission to the file). Click **Ok** to complete the upload. The file's metadata will be updated to reflect the newest version and when users 'download' the document it will be the latest version. This can severely minimize version control issues, but still maintains all previous versions of the document if a user needed to reference later.



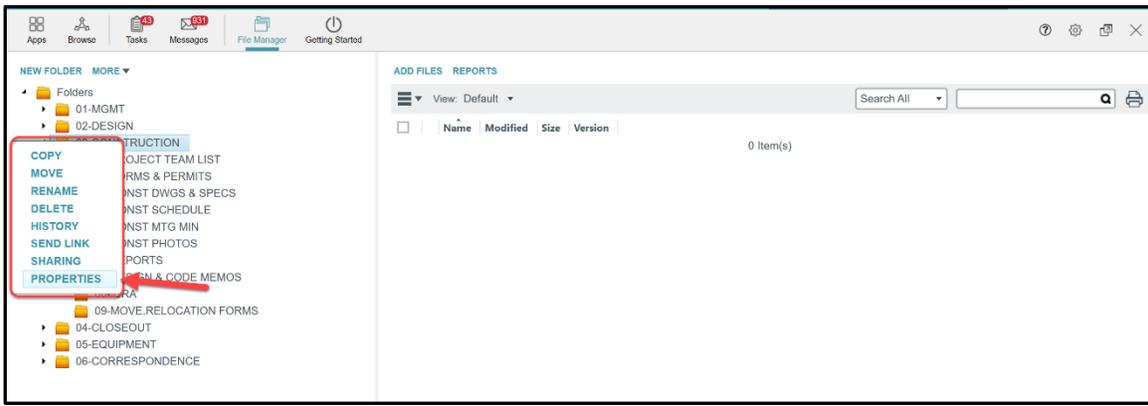
6. Note that the Mayo Clinic requires that users add the notified users' names in the **Comments** field as well for documentation and reference. This will help the Project Manager know who received the document notification.

DEFAULTING USER(S) TO RECEIVE FOLDER NOTIFICATIONS

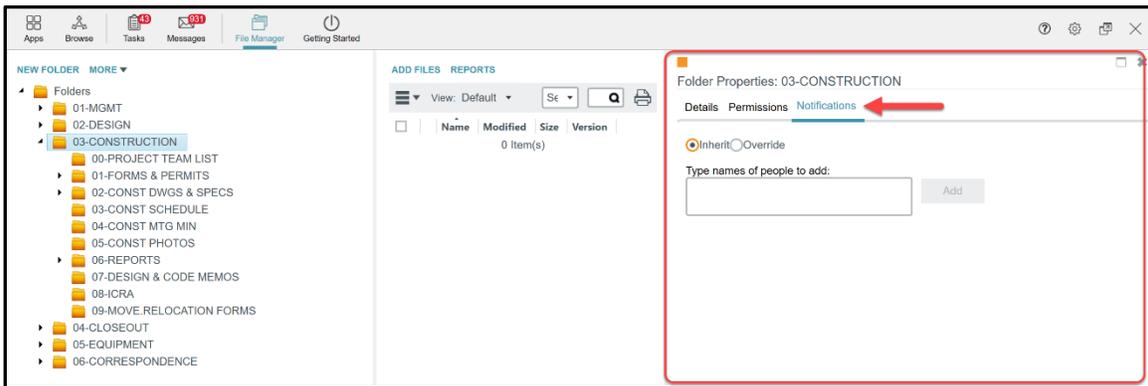
Users can be defaulted to receive notification for specific actions taken within a folder, such as notifications of an upload, edit (to file metadata or version, **not** to content itself within a file), deletion or file lock.

To do so:

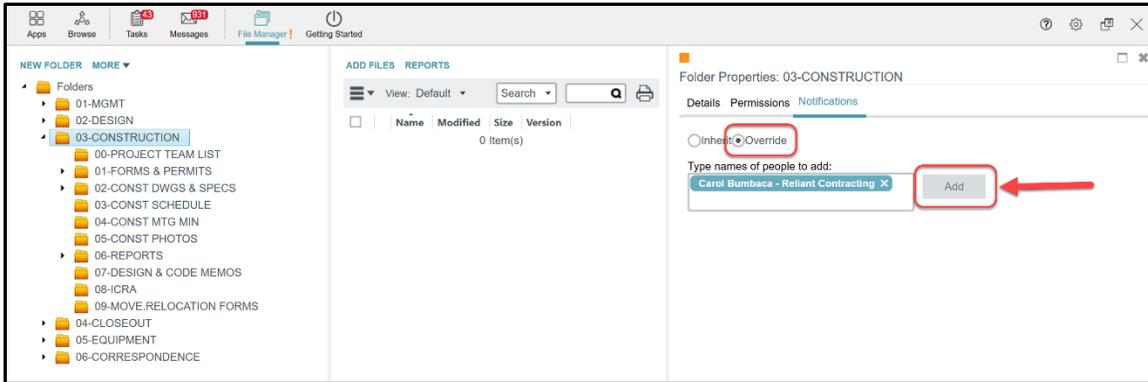
1. Select the folder that need to be defaulted for the notification in the Log pane (second pane from left) then do a right click.
2. Select **PROPERTIES** in the list.



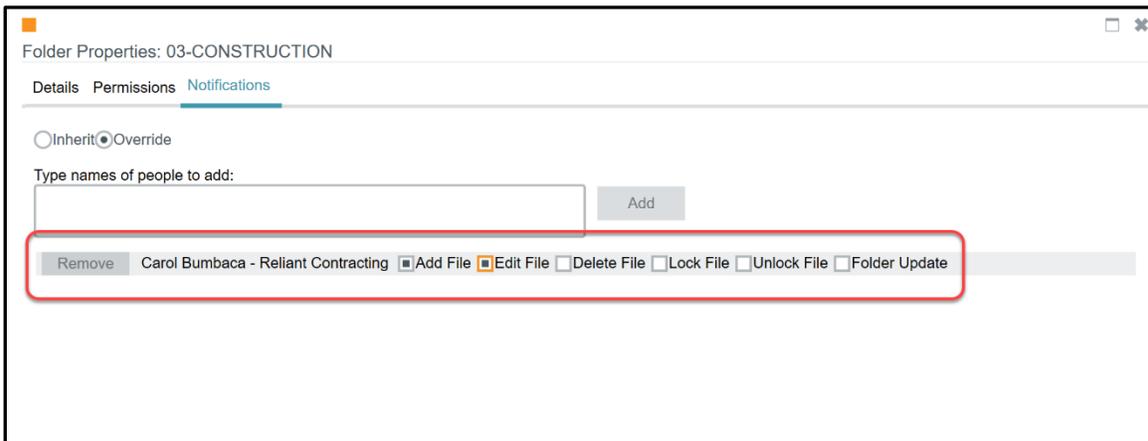
3. the Notification tab appears in the third pane.



4. Select **Override** then enter names of the user(s) desired and click on **ADD**. Note that by overriding the configuration on this folder, any notifications set up at a higher-level folder may be overridden here. Any notifications set on a folder will inherit down to the lowest level in the file path except if overridden.



5. Select the type of Notification that you would like for the specific user(s) added. Multiple notification types can be selected for everyone (notify of 'Add File', 'Edit File', 'Delete File' and / or 'Lock File.' For instance, if the user needs to be notified when a file is added and edited, select *Add File* and *Edit File* by checking the boxes to the left.

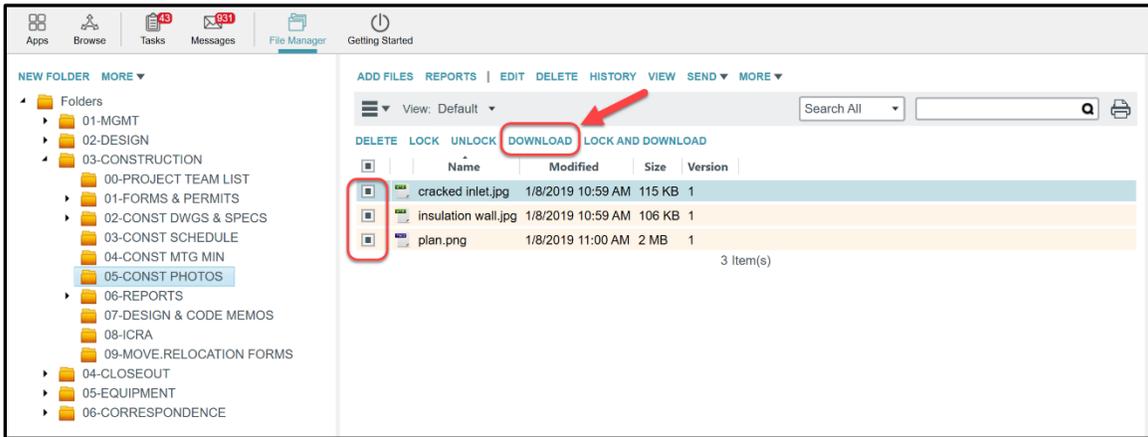


DOWNLOADING FILES

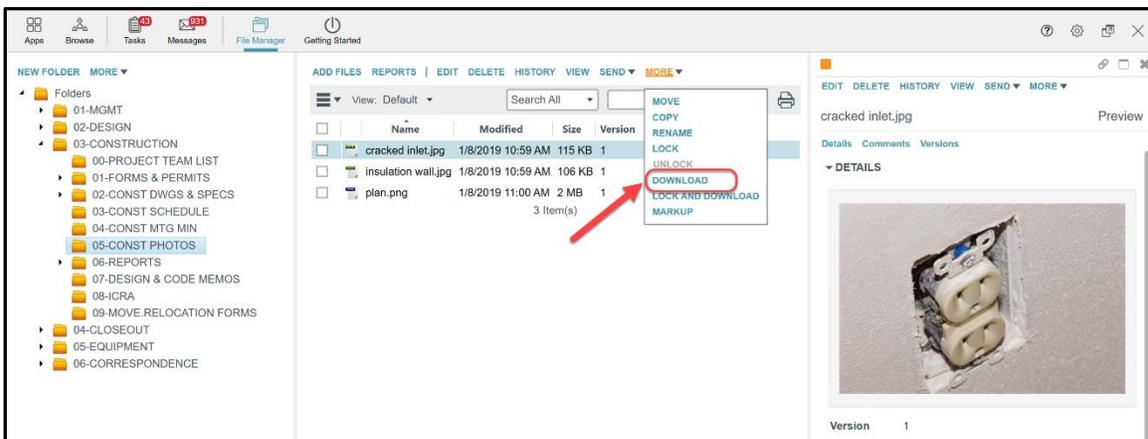
Users may download one or multiple files from Kahua to a local drive.

1. Within File Manager, navigate to the folder or files to download. Select the file(s) to download.
2. From the Log frame, you can download one or many files. Select files to download by clicking the box next to the file. The box will display as checked when selected ()

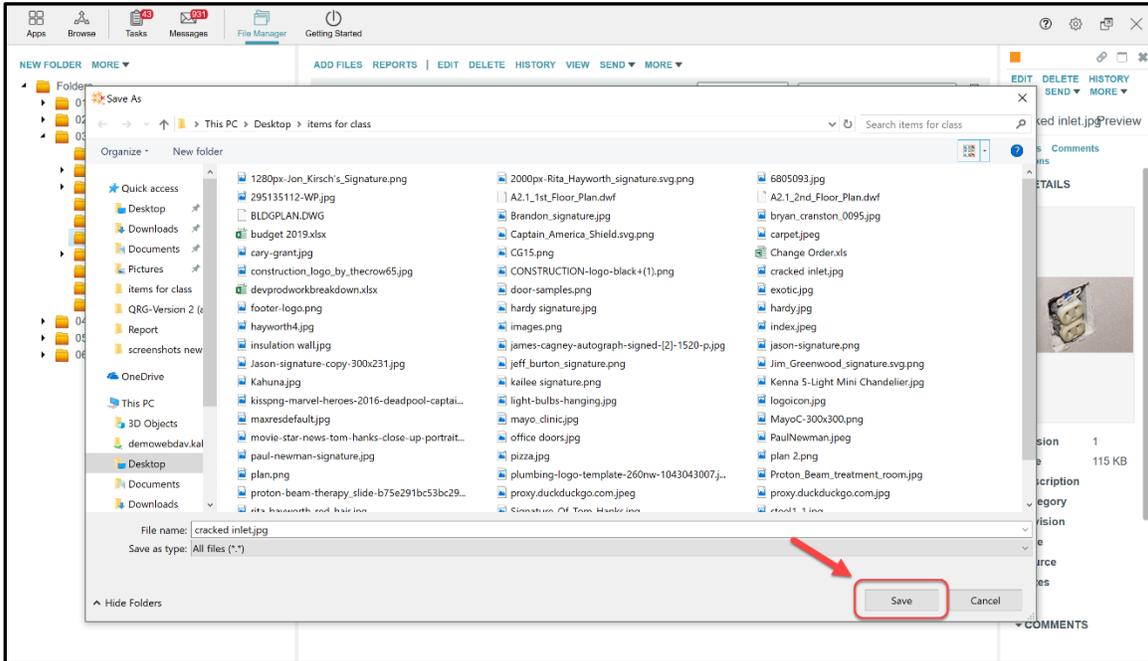
Note that a sub menu of action buttons appears as soon as 2 boxes are checked. Select **DOWNLOAD** to download these multiple files.



3. If users are only downloading one file, they may also select the Download button in the **MORE** dropdown menu.



4. After selecting and clicking **Download**, the user can specify where within local drives to place the downloaded items.
5. Click **Save**.



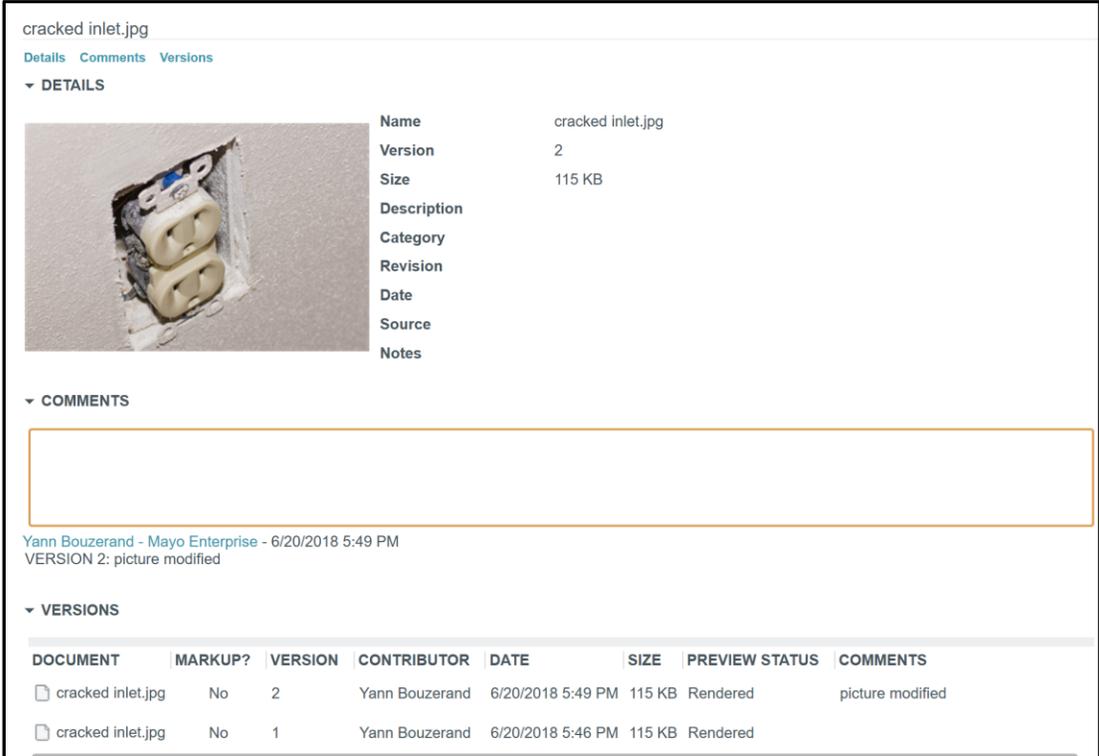
ACCESSING AND VIEWING PREVIOUS VERSIONS OF FILES

Per instruction above on uploading files (see section titled ‘Uploading Files or Incrementing Version of Files’), when a document has multiple versions, users can access the previous versions of the file and comments associated with previous versions.

Once at least two versions of a file exist, users can navigate into the Detail pane to see detailed metadata surrounding the versions. Within the Detail pane, scroll to the ‘Versions’ section of the form.

Notice below that the ‘Versions’ section will display a log of all versions, including information such as:

1. Version Number (with latest displaying at top)
2. Contributor – who uploaded this version
3. Date – date and time stamp of the version upload
4. Preview status – if a supported file type, users can click on this file version and click ‘View’ to render an in-application preview of the file. This status indicates if the version has been rendered and thus is available for viewing
5. Comments – comments associated with the version upon upload. The comments will also display in a threaded comment dialogue in the ‘Comments’ section



The screenshot displays the file manager interface for a file named 'cracked inlet.jpg'. At the top, there are tabs for 'Details', 'Comments', and 'Versions'. The 'DETAILS' section is expanded, showing a thumbnail of a cracked electrical outlet cover on the left and a list of metadata on the right. The metadata includes Name, Version (2), Size (115 KB), Description, Category, Revision, Date, Source, and Notes. Below the details is a 'COMMENTS' section with a large empty text box. A comment from 'Yann Bouzerand - Mayo Enterprise' dated 6/20/2018 at 5:49 PM is visible, stating 'VERSION 2: picture modified'. At the bottom, the 'VERSIONS' section is expanded, showing a table with columns for Document, Markup?, Version, Contributor, Date, Size, Preview Status, and Comments. Two versions are listed: Version 2 (Yann Bouzerand, 6/20/2018 5:49 PM, 115 KB, Rendered, picture modified) and Version 1 (Yann Bouzerand, 6/20/2018 5:46 PM, 115 KB, Rendered).

DOCUMENT	MARKUP?	VERSION	CONTRIBUTOR	DATE	SIZE	PREVIEW STATUS	COMMENTS
cracked inlet.jpg	No	2	Yann Bouzerand	6/20/2018 5:49 PM	115 KB	Rendered	picture modified
cracked inlet.jpg	No	1	Yann Bouzerand	6/20/2018 5:46 PM	115 KB	Rendered	

VERSIONS							
DOCUMENT	MARKUP?	VERSION	CONTRIBUTOR	DATE	SIZE	PREVIEW STATUS	COMMENTS
cracked inlet.jpg	No	2	Yann Bouzerand	6/20/2018 5:49 PM	115 KB	Rendered	picture modified
cracked inlet.jpg	No	1	Yann Bouzerand	6/20/2018 5:46 PM	115 KB	Rendered	

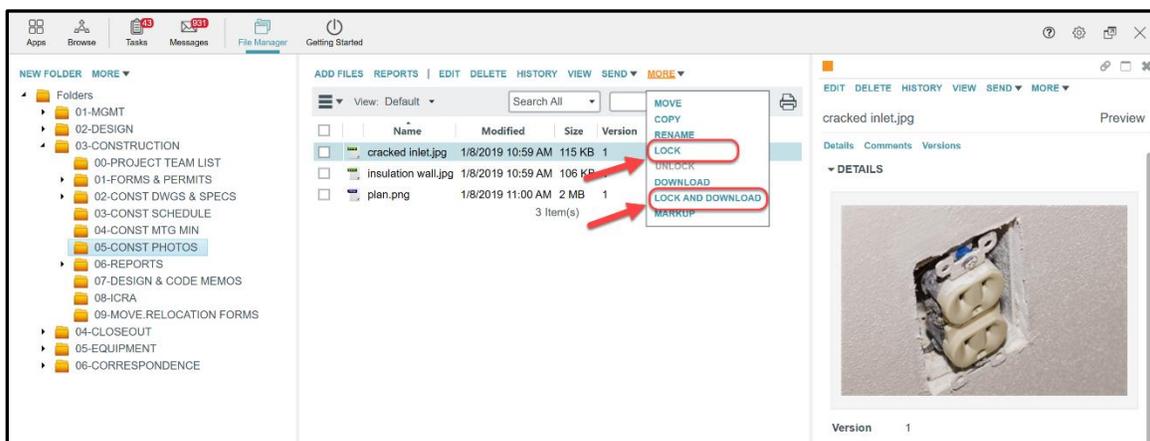
The users can select the version that they want to act upon. Upon selection of a Version, the action buttons below will appear, and users can select accordingly.

VERSIONS							
VIEW DOWNLOAD SAVE MARKUP							
DOCUMENT	MARKUP?	VERSION	CONTRIBUTOR	DATE	SIZE	PREVIEW STATUS	COMMENTS
cracked inlet.jpg	No	2	Yann Bouzerand	6/20/2018 5:49 PM	115 KB	Rendered	picture modified
cracked inlet.jpg	No	1	Yann Bouzerand	6/20/2018 5:46 PM	115 KB	Rendered	

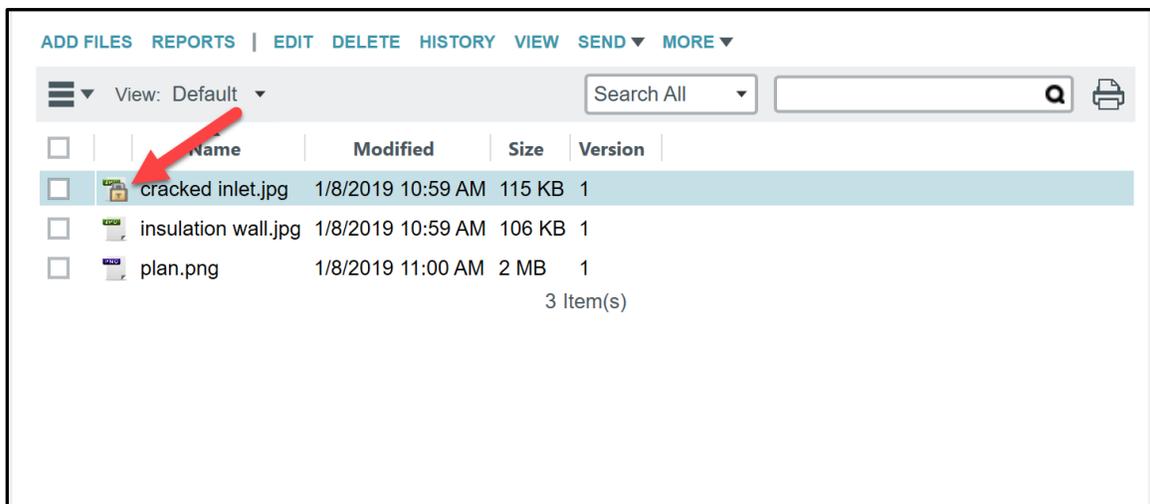
LOCKING FILES

Users can lock files in File Manager to prevent others from making changes to the file at the same time. Once a file is locked, only the user that locked the file or Kahua Administrators can unlock the file. Other users can still view and download locked files, but only the user that locked the file or an Administrator can upload a new version of the file. To lock a file:

1. Navigate to the appropriate project. Access the File Manager app from the App Launcher.
2. Navigate to the file(s) you want to lock. Select the file.
3. On the Action Bar, select **More** to display the dropdown menu. Select **Lock** or **Lock and Download** as appropriate.



Locked files have a padlock icon next to them in list views to indicate the file has been locked.



To unlock a file, select **More** to display the dropdown menu. Select **Unlock**. Otherwise, upon upload of a new version, the system will prompt you to select a box to 'Unlock File' when uploading the

newer version. It is best practice to unlock a file upon completion of edits or upload of a new file so that other users can access.

SENDING FILES AND LINKS

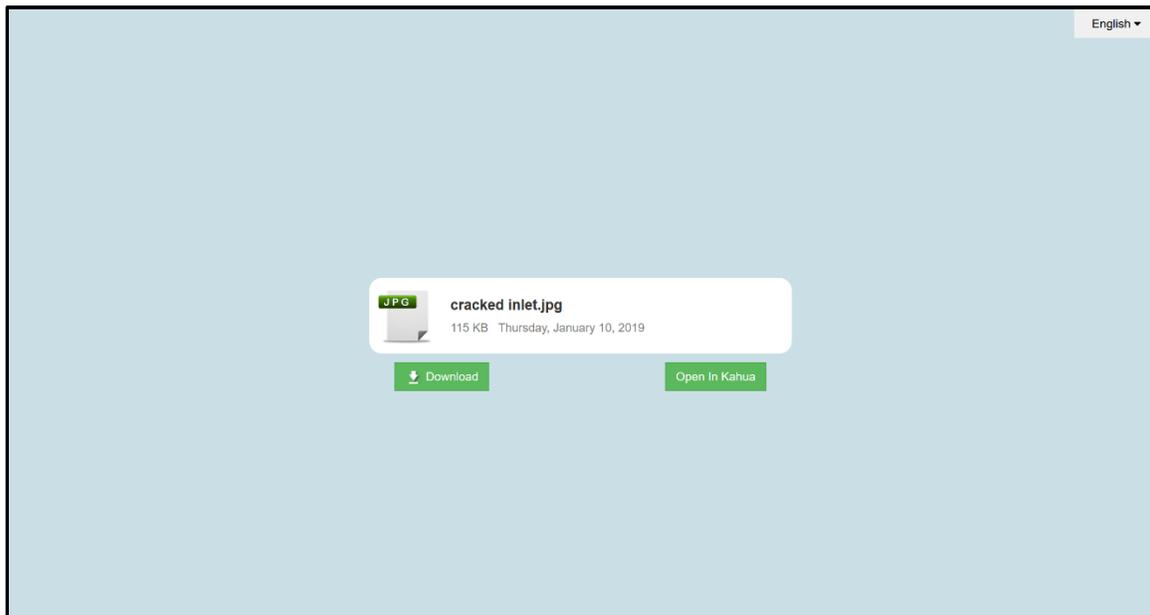
File Manager allows users to send files and file links to other project team members OR non Kahua users. There are two send actions available from the **SEND** dropdown menu:

SEND FILE sends the files as an attachment to the message or email. This is a good option for smaller files or sending files to people that do not have access to the folder in Kahua. This option is available for files in the Detail pane. Note that users will receive a Kahua message or email message (if sending to users outside Kahua) with the attachment. The users' email system may reject the file if too large, as the email will be subject to the recipient's email provider's file size limits.

SEND LINK allows users to send a link to a file or folder in File Manager. Sending a link will initiate a unique URL that will be sent to the individuals. The link will open a window that allows two ways to access Kahua:

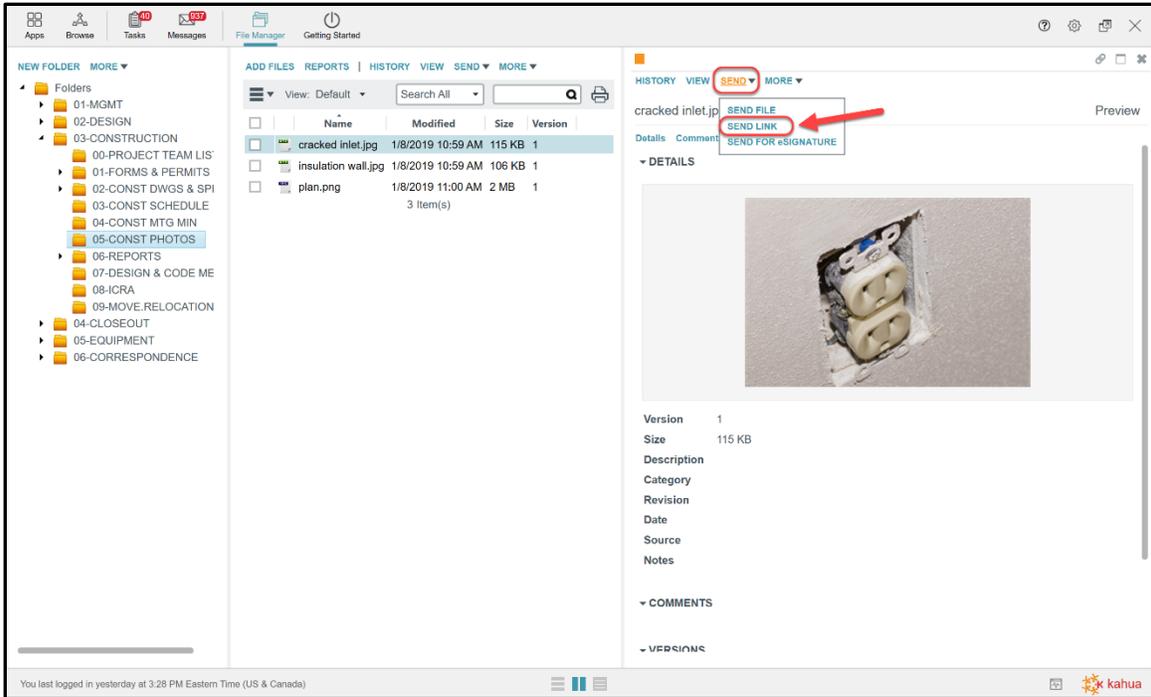
- The link will contain a **download** button to the file. This will allow Kahua users and non-Kahua users to download the files to their desktop.
- The link will also contain an **Open in Kahua** button that takes the Kahua user to the file in Kahua (if the user has access to the file).

Note that the non-Kahua users will not have the **Open in Kahua** button.



To send a link from within File Manager:

1. Navigate to the appropriate project with the **object** in either the Log pane or Detail pane.
2. Click **Send** to see the dropdown menu.
3. Click **Send Link**.



4. A message form appears in the View pane. An “Open File” link is embedded in the message body.
 - a. Fill in message fields (To, Cc, Bcc) as appropriate. To send to a user outside Kahua, type their email address in the field and click Enter on the keyboard.
 - b. Click the **Copy to Communications** check box to add this message to the Communications app (if desired).
5. Click **Send** to send the message.

New Message

To

Cc

Bcc

Copy to Communications

Subject

 Times New Roman 12

Here is a link to the Mayo Sample File.docx file. [Open File](#)

MARKING UP FILES

Kahua integrates with Bluebeam Revu to allow users to markup files. Only Bluebeam Revu will allow the users to mark up a file.

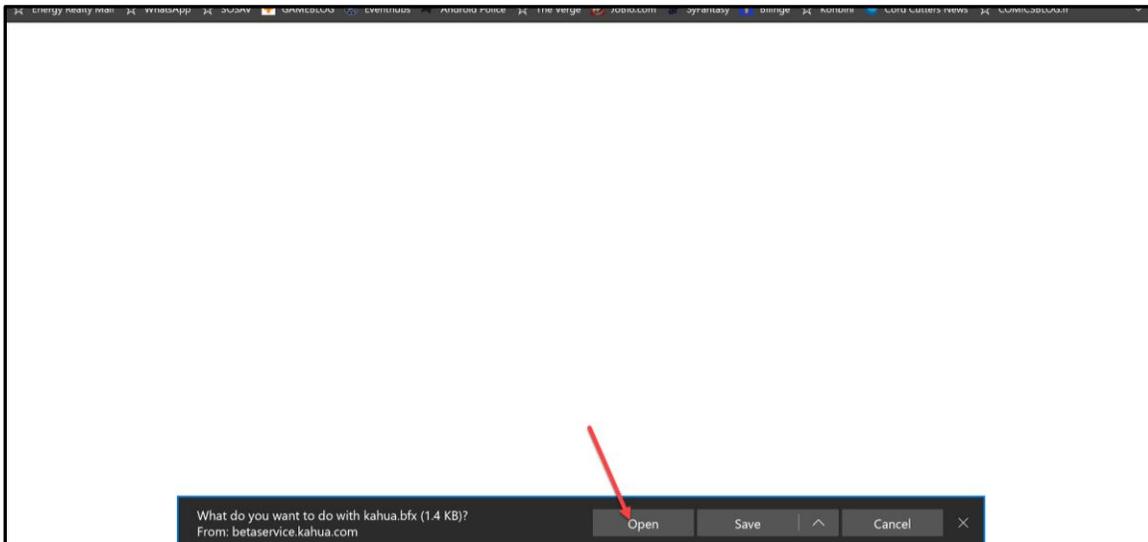
Users must have the appropriate Bluebeam license and have Bluebeam Revu installed on their computer to be able to mark up. The Bluebeam Revu license will allow the users to mark up a document.

After a user marks up a file, that markup layer is seamlessly saved in Kahua. The markup does not change the original file, and the user can render a view of the file with OR without markups directly in Kahua.

To utilize markups:

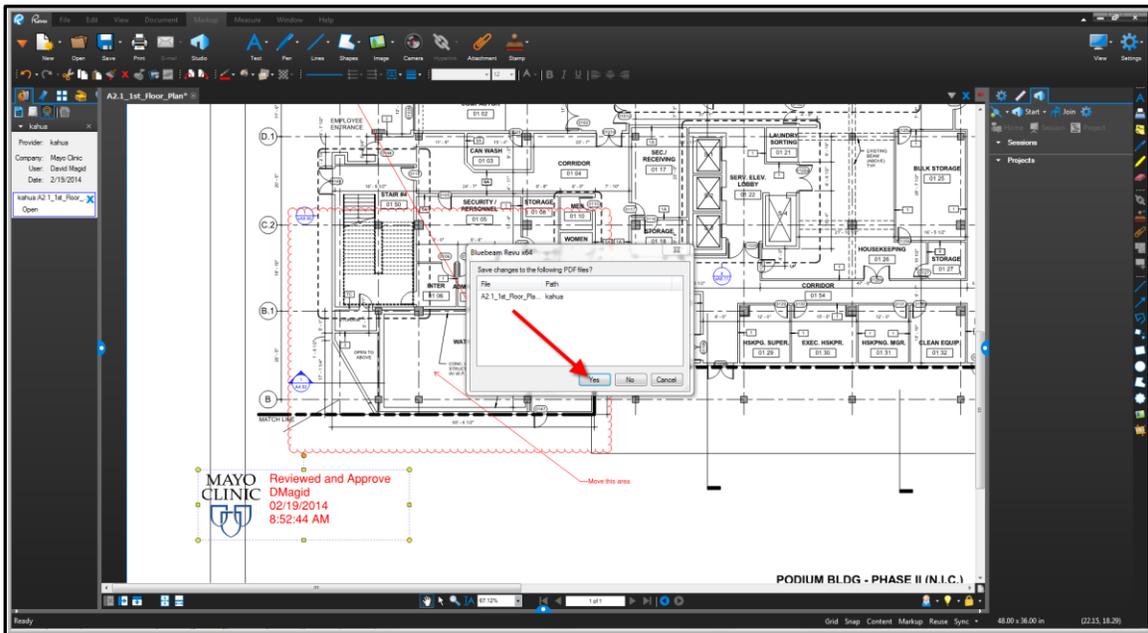
1. Navigate to the file you want to markup. Select the file.
2. Click **Markup**.
3. You will be prompted to open a .bfx file (here with Microsoft Edge). Click **Open** to launch Bluebeam Revu. This will open directly within Bluebeam.

Note that to avoid multiple people working to mark up a document at the same time, **users should Lock the document before marking up and unlock upon completion**. Locking the document will prevent other users to make modifications at the same time. See chapter titled “Locking file” for more details.

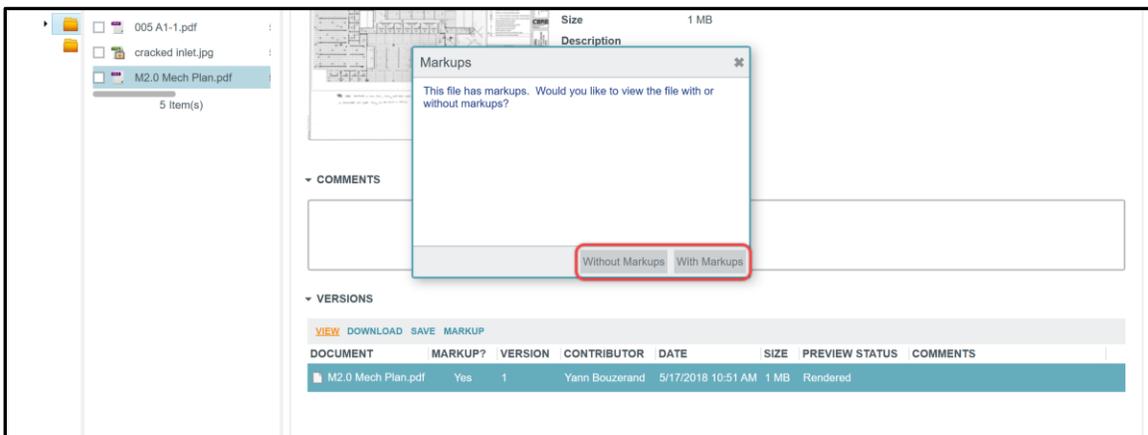


4. After completing your markup, click **Save** or simply close Bluebeam Revu to be prompted to save the file.

5. Click **Yes**. Your markup layer will be saved in Kahua. The markup does not change the original file.

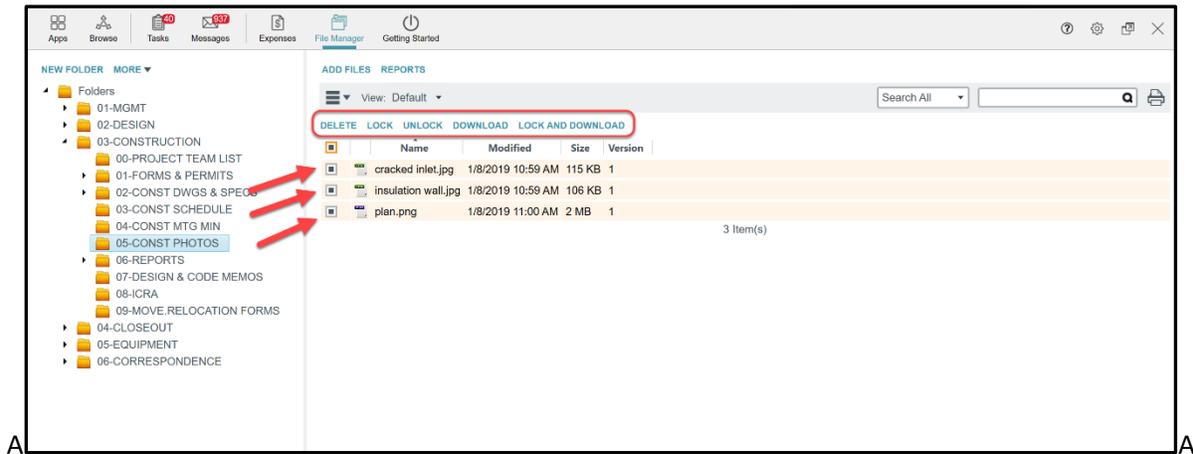


6. In Kahua, in the version section of the file, select **View**. The user chooses to look at the file with or without markup.



TAKING ACTION ON MULTIPLE FILES

1. To act on multiple files in File Manager, click the check box next to each file.
2. A second Action Bar will appear. Use the menu options on the action bar noted below to act upon multiple documents at the same time.



Delete – will delete the selected files. Only users with the correct permission will be able to delete a record.

Download – will let the user download the files in a ZIP folder.

Lock/ Unlock/ Lock and Download – will lock/unlock the selected files.

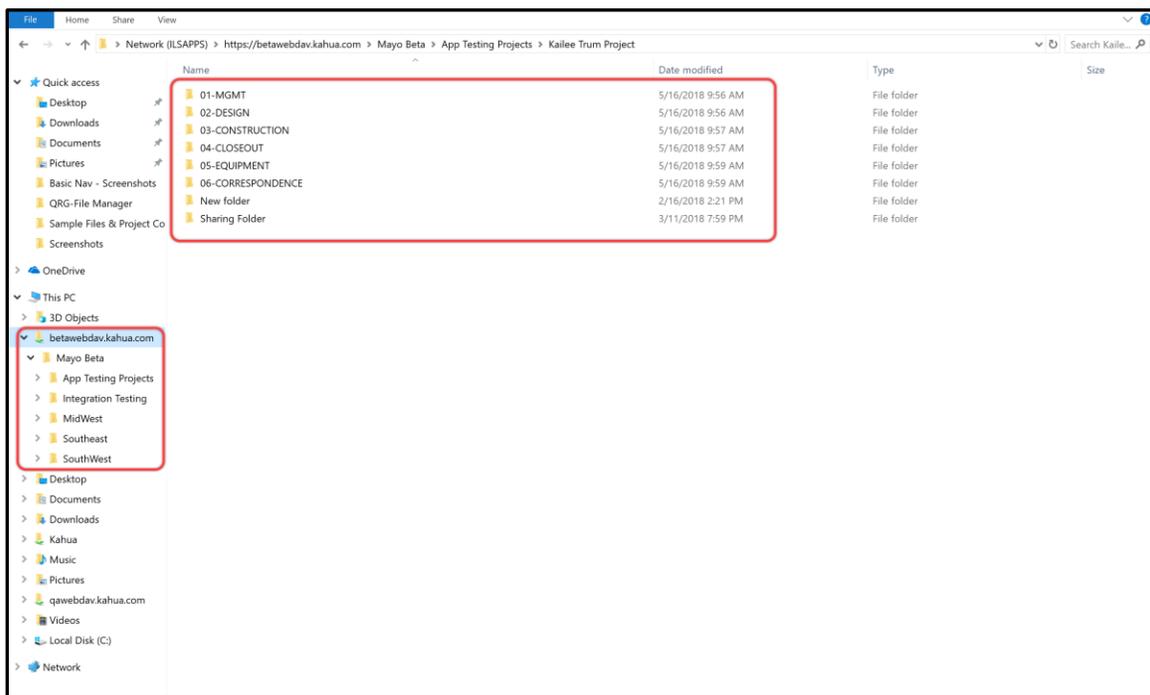
ACCESSING FOLDERS AND FILES IN WINDOWS EXPLORER

Users can access File Manager folders and files from Windows Explorer by mapping their local drive to Kahua. Follow the instructions in this Kahua Help video to set this up:

[Accessing Kahua File Manager in Windows Explorer via WebDAV](#)

When you have set up the access in Windows Explorer, users will only be able to access files that they have permission to. They may open files directly in the native application from the File Explorer and save back to the mapped drive. This will increment the version in Kahua accordingly. If any files are added or deleted (if you have permission to do so), this change will also be reflected real-time in Kahua.

1. Access Kahua by opening Windows Explorer. Click on the Kahua link under My Computer.
2. Navigate through the project structure to access the folders. Double click on files to open them in their native application. Click Save in the native application to save the file back to Kahua and increment version.



Note that the folders shared by the Mayo Clinic with their business partner will not be accessible to them from WebDAV. They will need to login in their domain in order to get access to the Mayo Clinic folders. **Only internal Mayo users will be able to access files on the Mayo domain via WebDAV.** Partners should access the shared File Manager list in their domain and utilize File Manager to interact with files per instructions in previous sections.

