



Training Guide  
DOCUMENT LIBRARY



E: [help@avinet.com.au](mailto:help@avinet.com.au)

W: [avinet.com.au](http://avinet.com.au)

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## Assigning Access Levels

Before users can attempt to manage document library, they must be assigned the correct access levels. Follow the steps below to assign the access levels:

- Step 1. Select **Operations > People > Personnel**. The **Personnel** screen is displayed.
- Step 2. Filter the **Personnel** screen according to your requirements.
  - Enter filter criteria in the text-box and click [Filter].
  - Select a value from the **Department** drop-down list to view personnel located in a particular department.
  - Select a value from the **Base** drop-down list to view personnel located in a particular base location.
  - Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.
- Step 3. Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.
- Step 4. Select 'Access Levels' from the **Personnel Profile** pane.
- Step 5. Click [Edit].
- Step 6. Select all the applicable access levels in the '**Document Library**' group.

Access Level	Description
<b>Document Library &gt; Document Library &gt; View All</b>	Allows users to access the library. Without this access, the library will appear empty to users. Access to read and write to specific folders in the library is controlled through the folder permissions.
<b>Document Library &gt; Document Library Administration &gt; Modify All</b>	Allows users to change folder permissions in the library.
<b>Document Library &gt; Create Manual Alerts &gt; Modify Selection or Modify All</b>	Allows users to create manual alerts only via the library to all or selected personnel.
<b>Air Maestro Administration &gt; Manual Alerts &gt; Modify All</b>	Allows users to generate all alerts to all personnel. It also grants users the permission to modify the alert categories via <b>Manage &gt; Setup &gt; Alerts</b> .

- Step 7. Click [OK].

## Document Library Overview

Air Maestro contains a library which allows personnel to quickly retrieve a range of company documents. Personnel with the required access level have additional options including the ability to:

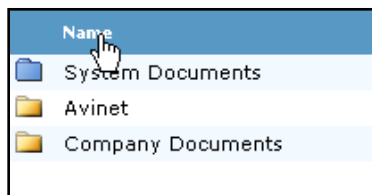
- Upload / delete documents
- Create / modify / delete folders
- Revise documents
- Create alerts to documents

Documents can include: maps, policies, procedures, forms, manuals, memos, minutes or any other information relevant to the organisation. The documents are stored in various electronic formats, including but not limited to: Portable Document Format (pdf), Microsoft Word (doc / docx) and Microsoft Excel (xls / xlsx).

The built-in version control system allows personnel to view previous versions of a document. View a previous version by right-clicking the required document and selecting [View Document History].

### Sort Documents

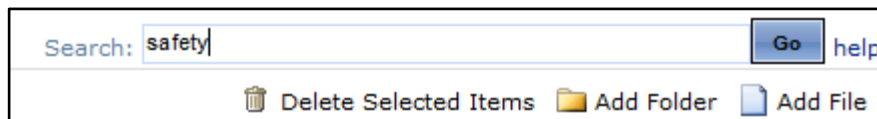
The **Document Library** screen contains a sort function which allows you to sort the documents contained in the current folder by Reference Number, Name, Version, Size, Type, Last Modified Date and Revision Date. Click the required column heading to sort the documents. For example, click the **Name** column heading to list all documents by ascending Name order (A-Z). Click the column heading a second time to display the list in descending order (Z-A).



### Find Documents

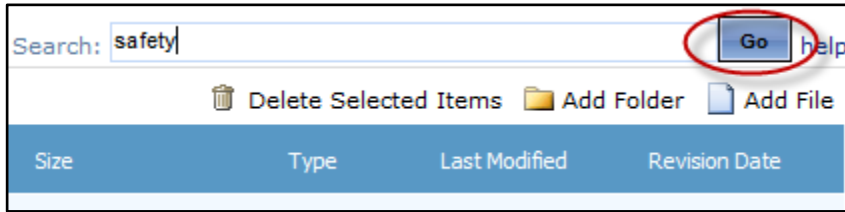
Step 1. Select **Library** from the main menu. The **Document Library** screen is displayed.

Step 2. Enter the search criteria in the **Search** field.



*If [Create New Instance] is not displayed, you have not been assigned the access level to complete this operational risk assessment. You must have the **Operational Risk Assessment > Operational Risk Assessment > Modify Self** access level assigned to create new operational risk assessments.*

Step 3. Click [Go].



The documents matching the search criteria are displayed. Alternatively, a '**No records to display**' message is displayed in the search results.

Step 4. Click on a match in the results list to display the individual document.

## View Documents

Step 1. Select **Library** from the main menu. The **Document Library** screen is displayed.

Step 2. Browse for the folder containing the document you want to view. Alternatively, if you are unaware of where the document is stored, enter the keywords in the **Search** text box and click [Go].

Step 3. Double-click the required document. The **File Download** dialog box is displayed.

Step 4. Click the button corresponding with the required system action.

The available options are:

Icon	Description
<b>Open</b>	Open the selected document in a new window.
<b>Save</b>	Save the selected document to a location on the computer or network.
<b>Cancel</b>	Stop the selected document from opening and return to the Document Library screen.

# Uploading Folders & Files

## Create Folders

- Step 1. Select **Library** from the main menu. The **Document Library** screen is displayed.
- Step 2. Browse to the required location for the new folder.
- Step 3. Click [Add Folder]. The **Create New Folder** dialog box is displayed.



*If the icons displayed below are not visible, you do not have permission to edit this folder. Refer to **Assigning Folder Permissions** for more information.*

- Step 4. Enter the name of the new folder in the **Folder Name** text box. Ensure the folder name is a succinct description of the folder contents.
- Step 5. Enter the reference number of the new folder in the **Reference No** text box. Using reference numbers to identify folders in the library sorts the folders according to the reference number.
- Step 6. Click [Add]. The new folder is added to the library.

## Upload Documents

- Step 1. Select **Library** from the main menu. The **Document Library** screen is displayed.
- Step 2. Browse to the required location for the new document.



*Before uploading a document, ensure that the file name is meaningful. It must be succinct, but descriptive. This file name is displayed in the library.*

- Step 3. Click [Add File]. The **Upload File** dialog box is displayed.



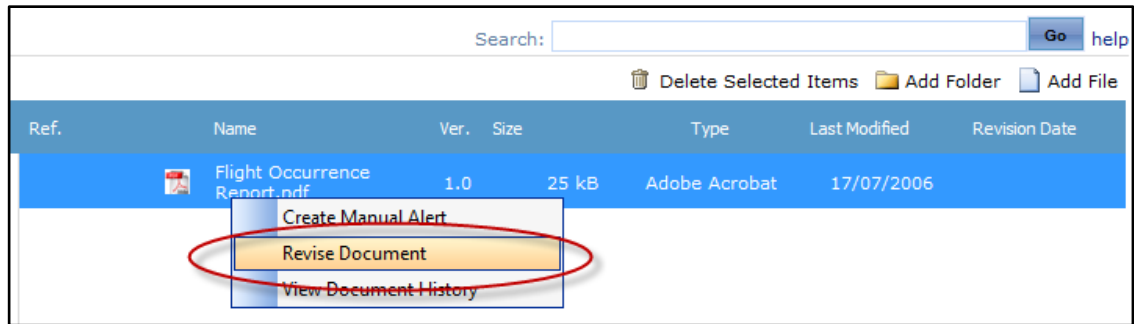
*If the icons displayed below are not visible, you do not have permission to edit this folder. Refer to **Assigning Folder Permissions** for more information.*

- Step 4. Click [Browse...]. The **Choose File to Upload** dialog box is displayed.
- Step 5. Browse for and select the required document.
- Step 6. Click [Open]. The path to the document is displayed in the **Upload File** dialog box.
- Step 7. Click [Next]. **Step 2** of the **Upload File** screen is displayed.
- Step 8. Enter the reference number for the document (if applicable) in the **Reference No** text box.
- Step 9. Enter any comments relating to the document in the **Description** text box.
- Step 10. Select the category which best describes the document from the **Categories** field.
- Step 11. Click [Finish]. The new document is added to the library.

## Revising Documents

The revise function must be used whenever a newer version of a document in the library is available or you want to update the document's properties (name, version and revision date).

- Step 1. Select **Library** from the main menu. The **Document Library** screen is displayed.
- Step 2. Browse for and right-click the required document.
- Step 3. Select **Revise Document**. The **Revise Document** dialog box is displayed.



- Step 4. Click [Select]. The **Choose File** dialog box is displayed. If there is no new version of the file, go to **Step 7**.
- Step 5. Browse for and select the revised file.
- Step 6. Click [Open].
- Step 7. Update the document name, description, version, reference number, review date, next review date or responsible personnel fields if required.



**Responsible Personnel** are automatically notified via a **'Caution'** alert of documents that require reviewing in the next 7 days. Documents that are overdue for revision are displayed as **'Critical'** alerts. Revision dates are calculated based on the **Next Review Date**.

- Step 8. Click [Revise].  
To create an alert to the revised document, refer to **Creating Alerts to Documents**.

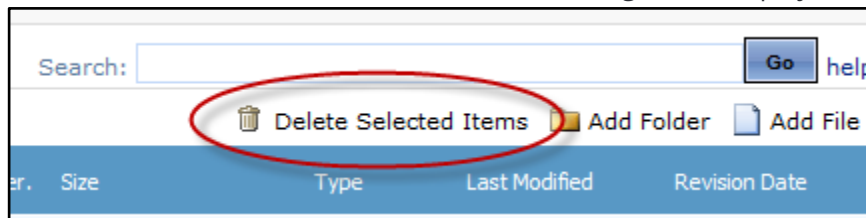
## Deleting Folders & Documents

- Step 1. Select **Library** from the main menu. The **Document Library** screen is displayed.
- Step 2. Browse to the required folder or document.



*If you delete a folder in the library, all the documents contained within the folder are also deleted.*

- Step 3. Click Select the required folder or document.
- Step 4. Click [Delete Selected Items]. A confirmation dialog box is displayed.



- Step 5. Click [OK]. The folder or document is removed from the library.

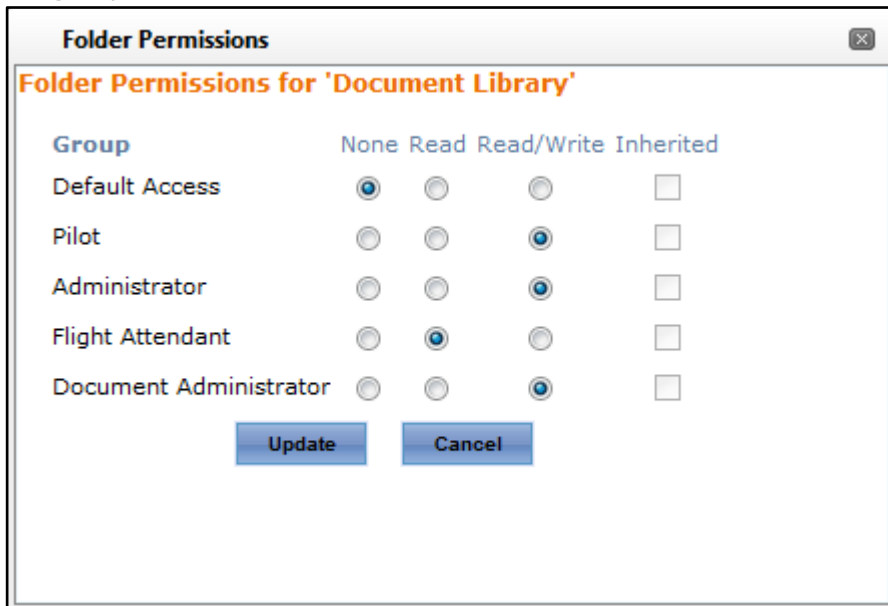


## Assigning Folder Permissions

Permission to the library can be controlled via access level templates. Access level templates can be created in Air Maestro and applied in the document library and risk register.

Permissions to folders in the library are inherited from the top level 'Document Library' folder. If you wish to setup uniform access to documents in the library, you will only need to set the permissions for the 'Document Library' folder and all other folders will inherit those permissions. If you wish to overwrite the inherited permissions for specific folders (for example, an engineering or administration only folder), you will also need to set the permissions on that specific folder.

- Step 1. Select **Library** from the main menu. The **Document Library** screen is displayed.
- Step 2. Browse to the required folder in the left pane of the **Library Browser**.
- Step 3. Right-click on the required folder and click [Folder Permissions]. A **Folder Permissions** dialog box is displayed. This dialog box lists all the access templates that are used within your company. To see which users belong to a particular template, hover your mouse over the group name.



If you wish to alter the access templates refer to the **Managing Access Templates** guide.

- Step 4. Select the required radio button for each group in your company to assign the required permissions.

Option	Description
<b>None</b>	Prevents the selected group from accessing files in this folder.
<b>Read</b>	Allows read-only access for the selected group to this folder.
<b>Read/Write</b>	Allows both read and write access for the selected group to this folder.

- Step 5. Click [Update].

## Creating Document Alerts

Each time a document is created or modified in the document library, it is good practice to create a manual alert to notify relevant personnel of the updates. Alert recipients are notified of document updates in their Alerts screen when they first login. They are required to open and read the document or read the document the next time they login. The alert creator can monitor who has read the alert and associated document.

- Step 1. Select **Library** from the main menu. The **Document Library** screen is displayed.
- Step 2. Right-click the required file in the right pane of the **Library Browser**.
- Step 3. Select **Create Manual Alert**. The **Alert Details** screen is displayed.

### Alert Details

Title:

Priority:

Category:

Description:

URL:

*Enter Each URL on a new line  
eg. <http://demo.airmaestro.com.au>*

Assign To:

Send email to the selected personnel  
 Send SMS to the selected personnel

- Step 4. Enter a descriptive name for the alert in the **Title** field.
- Step 5. Select a priority for the alert from the **Priority** drop-down list.
- Step 6. Select a category to describe the alert from the Category drop-down list.



To create a new category, select **Manage > Setup...>Alerts** and right-click 'Top Level' in the **Alert Categories** tree. Select [Add], enter the new category name and click [Add Category].

Step 7. Enter a description for the alert in the **Description** field.

Description: Please review the updated safety instructions for the Adelaide base.

Step 8. Select the alert recipient(s) using the **Assign To** drop-down list.



*If you are unable to view the desired personnel from the **Assign To** drop-down list your access may be limited by the **Document Library > Create Manual Alerts > Modify Selection** access level. Contact your Air Maestro Administrator for additional access if required.*

Step 9. Select the **Send email to the selected personnel** tick box to notify selected personnel via email that a new document alert requires their acknowledgement in Air Maestro.

Step 10. Select the **Send SMS to the selected personnel** tick box to notify selected personnel via SMS that a new document alert requires their acknowledgement in Air Maestro.

Step 11. Click [OK]. The **Alerts** screen is displayed.



*To monitor who has read the alert, select **Manage > Edit... > Alert**. Click the magnifying glass for the required alert and scroll to the **Alert Recipients** pane.*