Designtech Help Documentation for iCoordinator™

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Two factor Authentication

From version 3.0.7 it is now possible to activate two-factor authentication for a portal or an individual user. This means that if two-factor authentication is enabled for a portal, members of the portal need to download either *Microsoft Authenticator* or *Google Authenticator*, and use it to generate a verification code that they use when logging in.

Note that requiring two-factor authentication for all users in a portal can only be activated by a user who got the permission *Portal administrator* or *Portal owner*. This function can be found under "*Administration/Portal settings*". Click the slider to enable the two-factor authentication and click *OK* on the confirmation in the window that appears. Then the two-factor authentication is activated for all users.
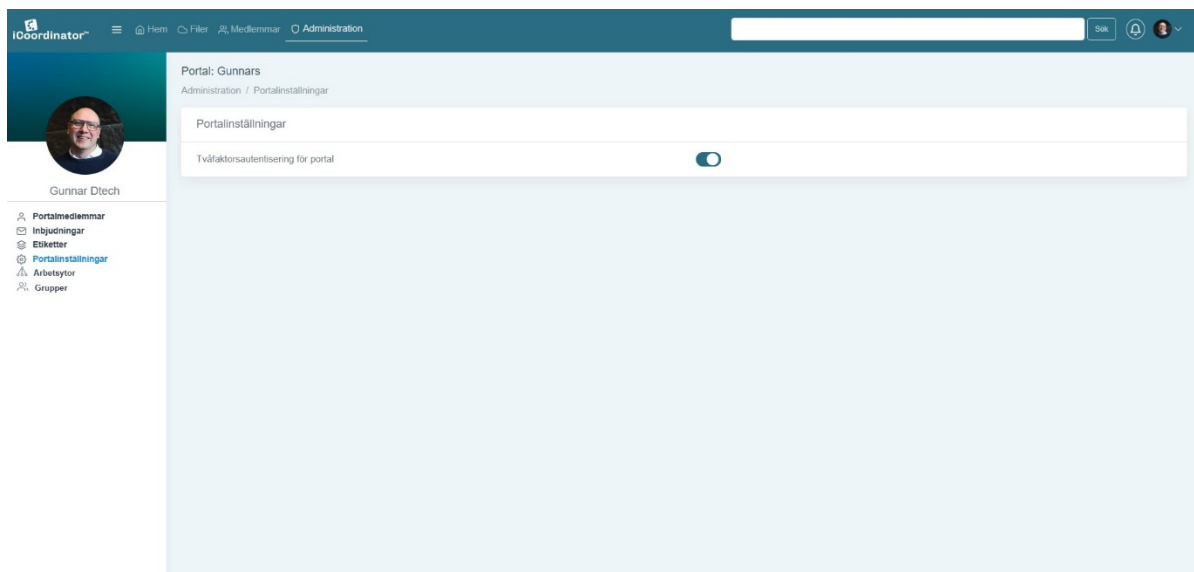
Microsoft Authenticator and *Google Authenticator* for Android are downloaded from *Google Play*. For the iPhone, *App Store* is used instead.

Install an Authenticator app and get started

If you have an Android device, use *Google Play* to download *Microsoft Authenticator* or *Google Authenticator*. For an Apple device, use *App Store* instead.

1. Start by searching for the app you want to install and use, then click "*Install*". *Microsoft Authenticator* is shown in the example, *Google Authenticator* works similarly.
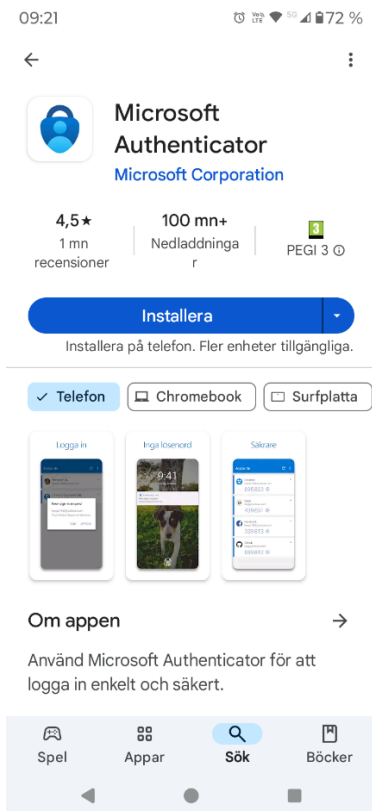
2. Go to "*apps.icoordinator.com*" in your browser and use your login credentials as usual to login.
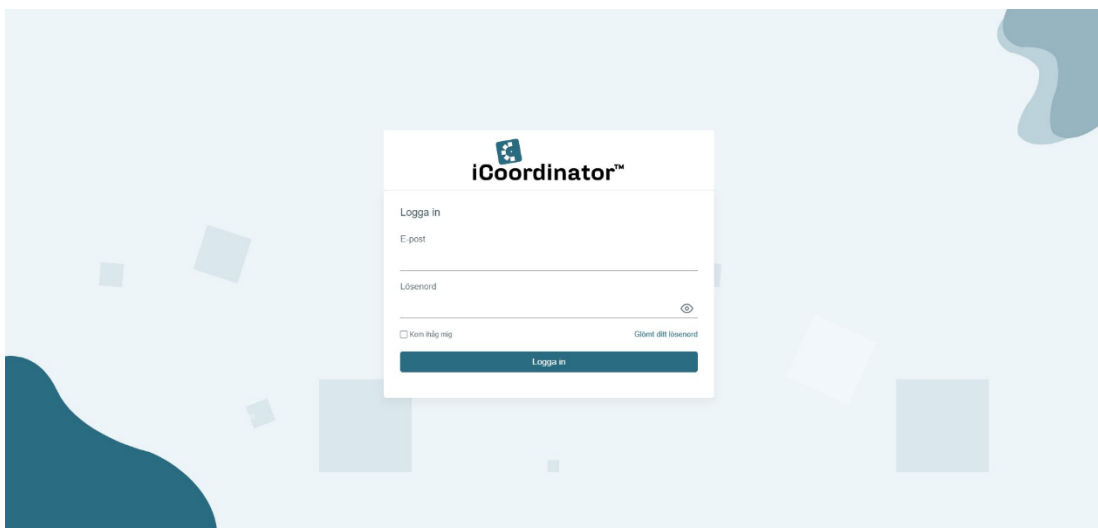
3. In the window that appears, use the QR code to add a new account to your app. Launch your app.
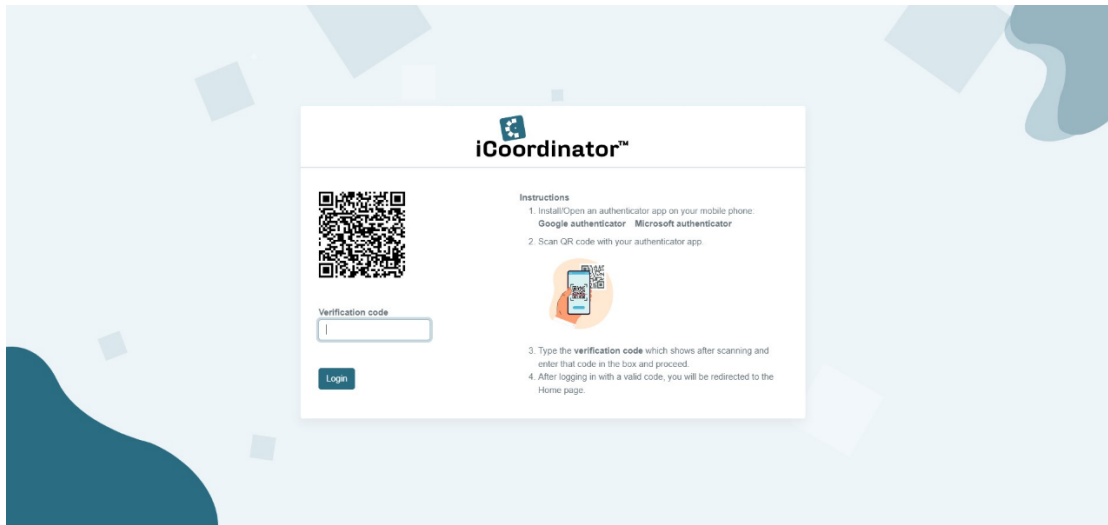
4. Click on the "*Add account*" button, or on **+**, to be able to scan the QR code with your device.

5. First select in the app which type of account you want to use, and which suits you best. Then scan the QR code with your phone/device.
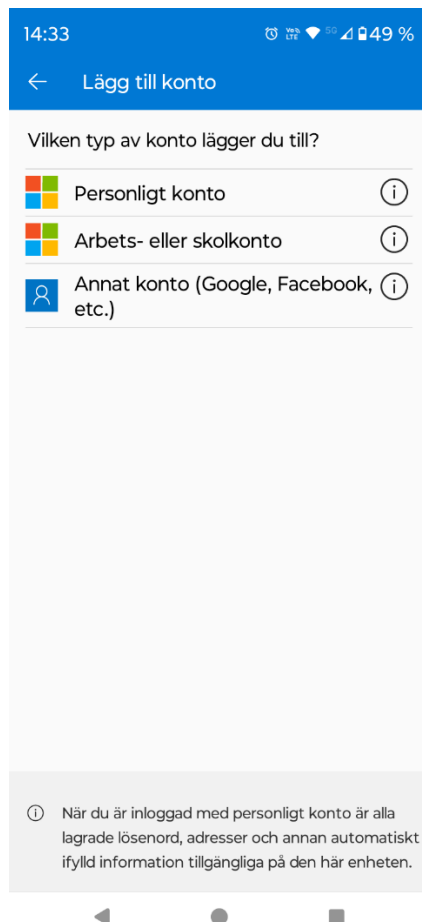
6. Use the account just created and click on it to generate the verification code.
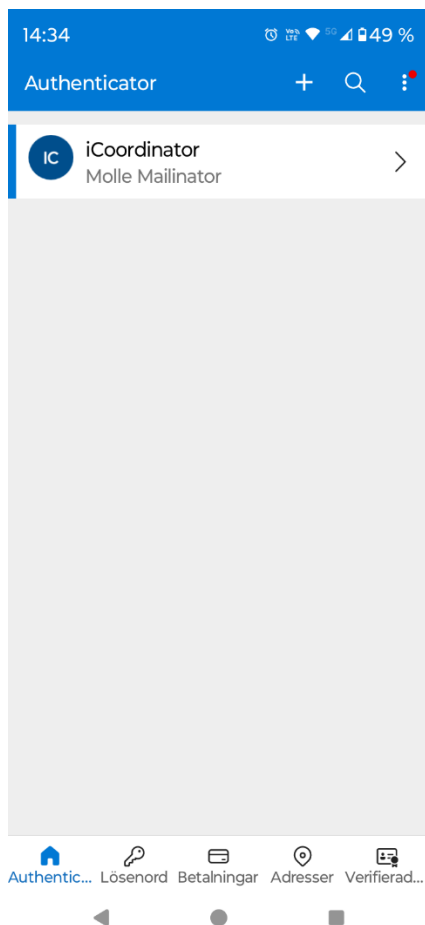
7. Now the verification code that you will use is displayed, note that the code is renewed and generated at a certain time interval, this is to increase security. If the code doesn't work, try entering the newer code, or start over again by entering your email address and password. If that doesn't work, you will automatically be sent to the login page again if you reload the page.
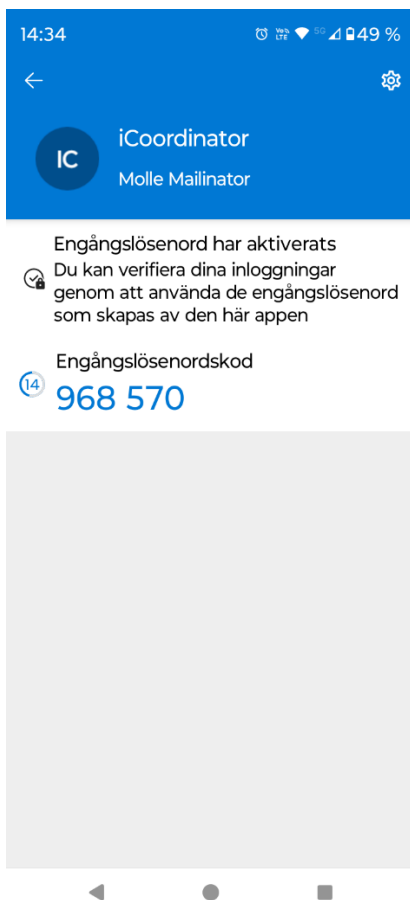
8. Enter the verification code in the "Verification code" box to log in.
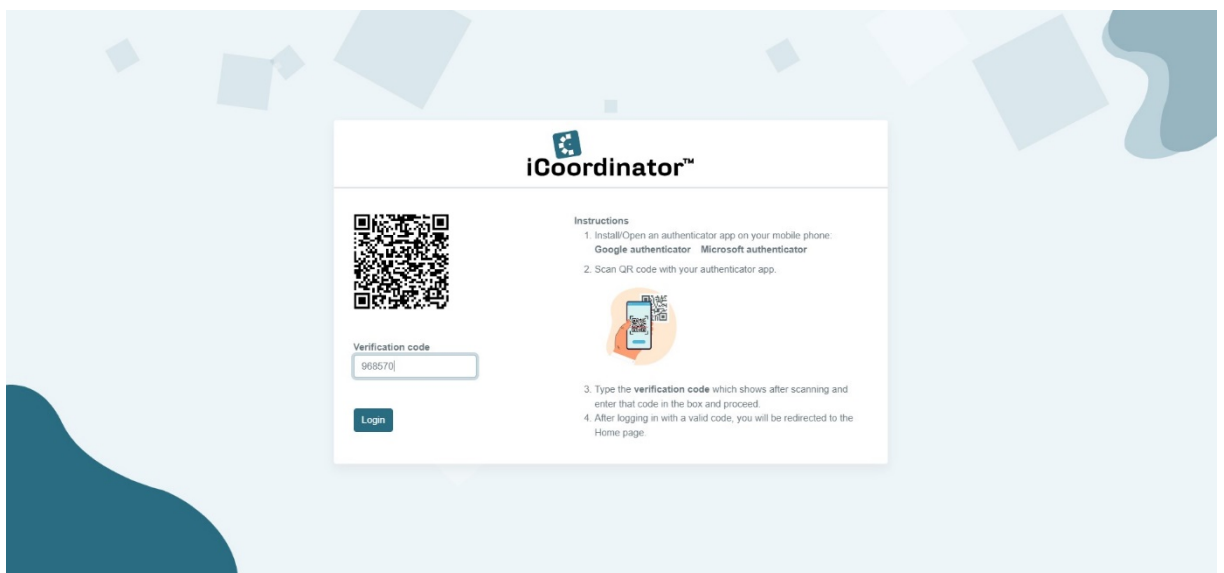
9. Please note that if you somehow need to change phone/device or authenticator, you need to contact *support@designtech.se* and we will help you reset your two-factor authentication, so that you can scan the QR code again. The "*Two factor authentication*" button under "*My

profile" is no longer clickable since the two-factor authentication has been activated by the *Portal administrator*.
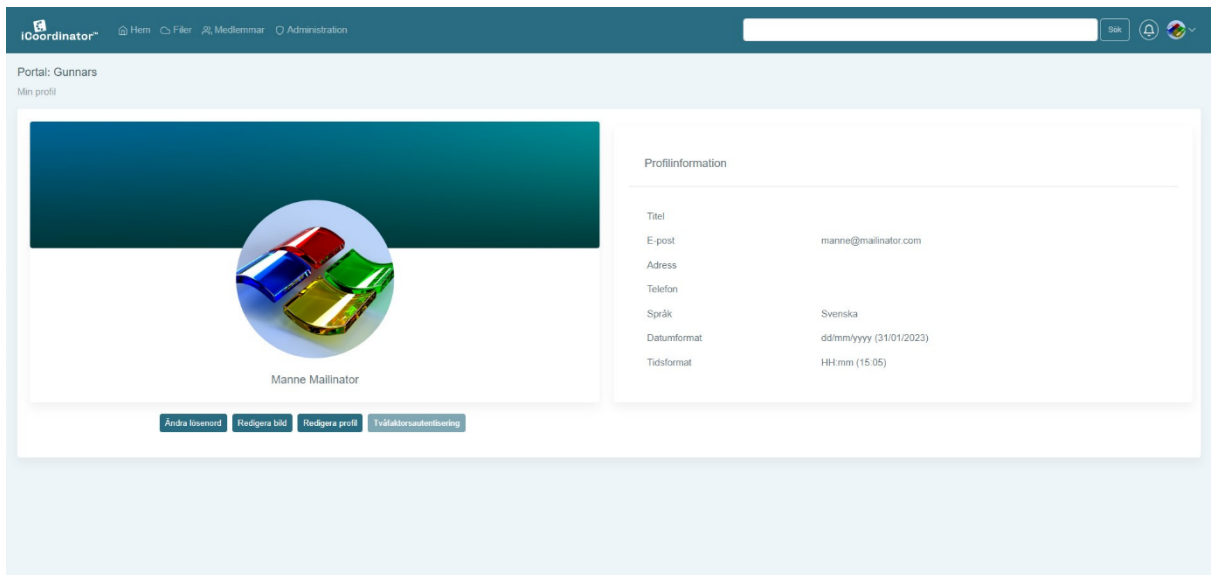
10. The next time you log in, after entering the email address and password in the first step, you will only see the "*Verification code*" field in the second login screen. There you then use the app on your phone/device to generate a code that you enter in the field.
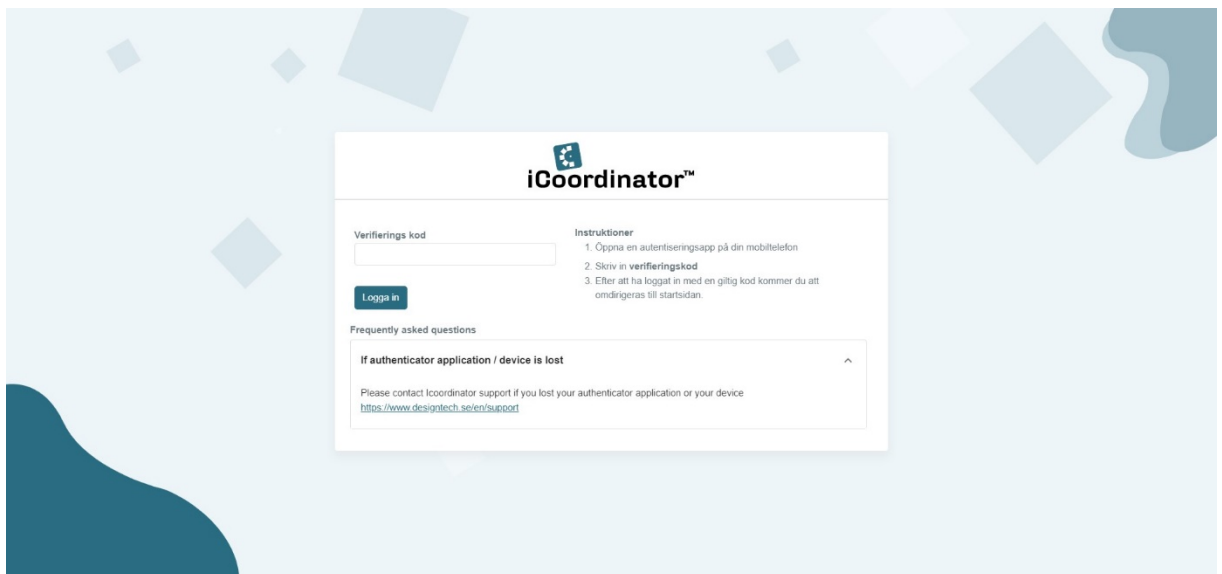
Enable and disable two-factor authentication for your user

Please note that the "*Two factor authentication*" button under "*My profile*" is no longer clickable since the two-factor authentication for the portal is activated by the *Portal administrator*. But before it is enabled for the portal, you as a user can always choose to enable the two-factor authentication yourself if you want, and also disable it afterwards. Do like this:

1. Navigate to "*My profile"*, which you will find at the top right when you are logged in to *iCoordinator*. There, click on the "*Two factor authentication*" button.
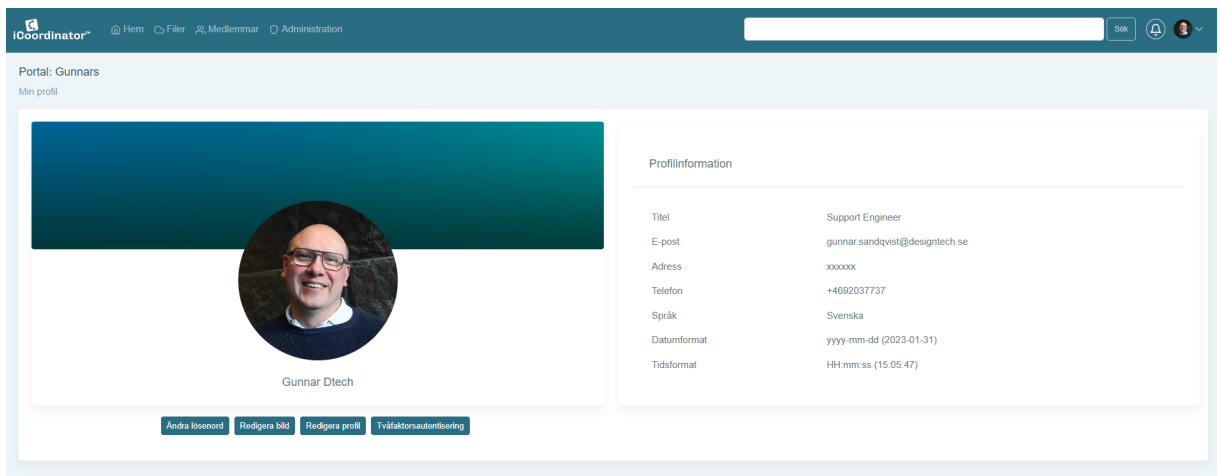
2. Now you get the option to generate a QR code to enable two-factor authentication. Click the "*Generate QR*" button.
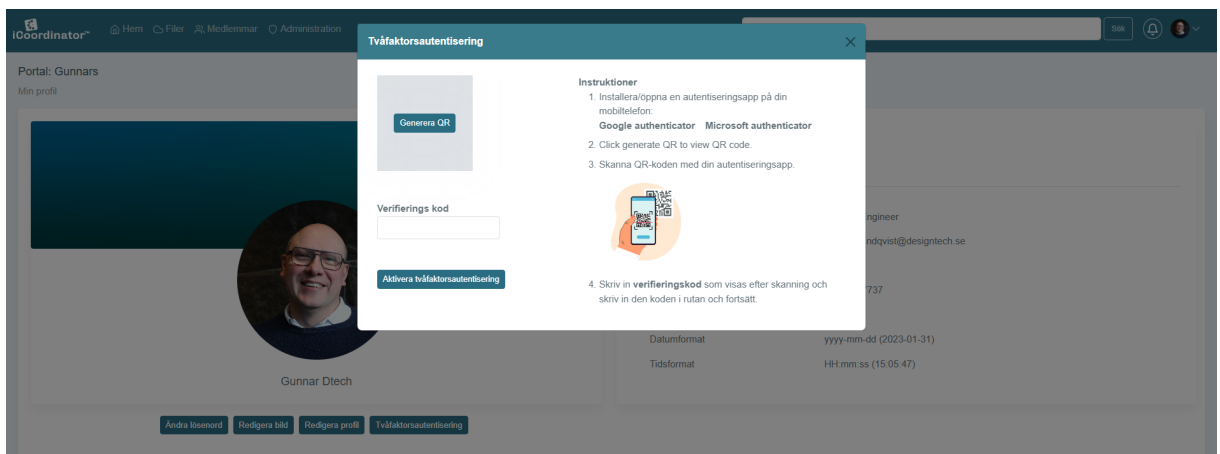
3. Scan the QR code with the app you downloaded and installed on your phone/device (see points 4-6 above). Enter the code from the app in the field "*Verification code*" to be able to click the button "*Enable two factor authentication*", and activate. Click *OK* on the confirmation in the window that appears.
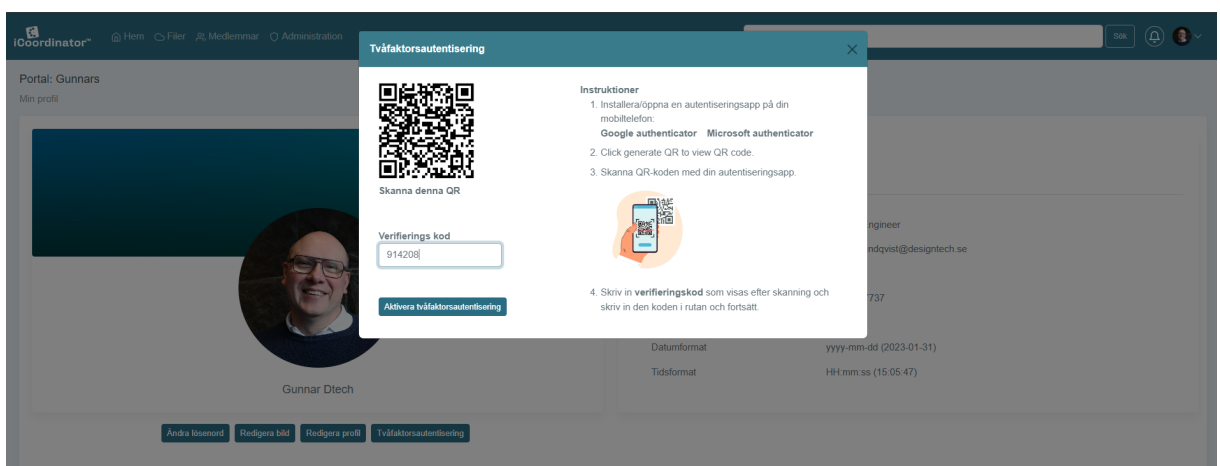
4. If you want to disable the two-factor authentication, do it in a similar way, but then you just
    need to use the verification code from the app and enter it in the "*Verification code*" field and
    then click the "*Disable two factor authentication*" button at the bottom. Click *OK* on the
    confirmation in the window that appears.

    Don't forget to also remove the account from your app. In *Microsoft Authenticator*, you click
    on the gear symbol at the top right and choose "*Delete account*", in *Google Authenticator* you
    swipe right with your finger and choose to delete the account.
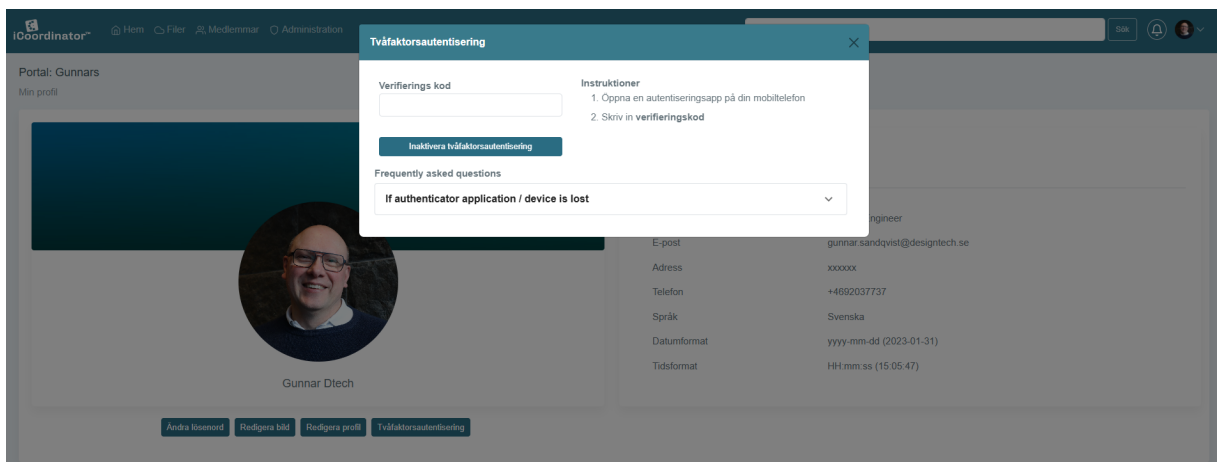
General functions

General functions can be found at the top right corner of the window (next to Search).

Switch Portal

Here you can handle switch portal if you are member of more than one.

- *Switch portal*
    1. Click on **Switch portal** below the cogwheel.
    2. In the drop-down menu *Select portal*, choose what portal you want to switch to.
    3. Click on the button **Continue**.

Download clients

When you click on **Download clients...** you will end up on our download page where you find our apps. Here you can download our mobile apps for iOS and Android or out desktop apps for Windows or macOS, that helps you to easier access and work with files and folders in your workspace and portal from your device.

Help

If you click on **Help** you will end up on our download page where you can download the manual for *iCoordinator*. In that you can read more about the tool and its functions.

Support

If you click on **Support** you will end up on our Support pages. Here you can read more about how you get in contact with our support department.

About

In **About** you can get information about what version of the *iCoordinator* you got. This can be useful when you contact our support department.

My profile

In *My profile* you can see your *Name*, *Title*, *E-mail* and *Telephone.* If you want to manage your profile information, you can click on the button **View profile**. There you can also *Change password*. You can see and change *Name*, *Title*, *Telephone* and *Address* under *Edit profile*. Under *My Settings* you can change *Language*, *Date format*, *Time format* and *Subscriptions*. **NOTE**: Under *Subscriptions* you can choose between *Instantly* (can take up to 10 minutes until e-mail will be delivered) or *Daily*.

- *Edit profile and My settings*
    1. Click on the button **View profile**.
    2. Then click on the button **Edit profile**.
    3. Edit the information you want to change in the fields *Name*, *Title*, *Telephone* and *Address* in the pop-up window *Edit profile information*. Here also you can change your personal settings under *My settings*. Use the drop-down menus to change. **NOTE**: Under *Subscription* you can choose between *Instantly* (can take up to 10 minutes until e-mail will be delivered) or *Daily*.
    4. Click on the **Done** button when you are done.
    5. Confirm dialog box with **Done** again.

    If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

- *Change password*
    1. Click on the button **Change password**.
    2. Fill in the new password in both the field *New password* and in the field *Confirm password* in the *Change password* pop-up window.
    3. Click on the **Done** button when you are done.
    4. Confirm dialog box with **Done** again.

    If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

- *Edit image*
    1. Click on the button **Edit image**.
    2. Use drag n' drop to add and upload a picture to your profile, or you can click on the text *Drag and Drop Files Here* to browse for a picture to upload.
    3. After upload is finished you can crop your image. Click on button **Done** when you are finished.
    4. Click on the **Save** button when you are finished.
    5. Confirm dialog box with **Done** again.

    If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

NOTE: Change of your login e-mail address is not allowed from user profile. Please contact your portal admin or support to get help with that.

Log out

Click on **Log out** when you want to log out of the portal. You will then be redirected to the login window again.

Home

In *Home* you get an overview and information about the portal. Here you can see the *Members* in the portal, you can see *Local weather* for selected location, *My profile*, *Favorite folders and Favorite Smart folders,* and here you can see *Activity history* and *Available labels.*.

Members

This is a list showing all the members in the portal and their contact information.

You can click on the *E-mail* links and *Telephone* numbers.

Local weather

Under *Local weather* you can choose a location and see the current weather for that location.

- *Select location*
    1. Click on the button **Select location**.
    2. In the pop-up window *Enter location* that opens, you can select which location you want see. Type in a location and choose the right one in the list below that shows up.

My profile

In *My profile* you can see your *Name*, *Title*, *E-mail* and *Telephone.* If you want to manage your profile information, you can click on the button **View profile**. There you can also *Change password*. You can see and change *Name*, *Title*, *Telephone* and *Address* under *Edit profile*. Under *My Settings* you can change *Language*, *Date format*, *Time format* and *Subscriptions*.
NOTE: Under *Subscriptions* you can choose between *Instantly* (can take up to 10 minutes until e-mail will be delivered) or *Daily*.

Edit profile and My settings
1. Click on the button **View profile**.
2. Then click on the button **Edit profile**.
3. Edit the information you want to change in the fields *Name*, *Title*, *Telephone* and *Address* in the pop-up window *Edit profile information*. Here also you can change your personal settings under *My settings*. Use the drop-down menus to change.
   NOTE: Under *Subscription* you can choose between *Instantly* (can take up to 10 minutes until e-mail will be delivered) or *Daily*.
4. Click on the **Done** button when you are done.
5. Confirm dialog box with **Done** again.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Change password

1. Click on the button **Change password**.
2. Fill in the new password in both the field *New password* and in the field *Confirm password* in the *Change password* pop-up window.
3. Click on the **Done** button when you are done.
4. Confirm dialog box with **Done** again.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Edit image

1. Click on the button **Edit image**.
2. Use drag n' drop to add and upload a picture to your profile, or you can click on the text *Drag and Drop Files Here* to browse for a picture to upload.
3. After upload is finished you can crop your image. Click on button **Done** when you are finished.
4. Click on the **Save** button when you are finished.
5. Confirm dialog box with **Done** again.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

NOTE: Change of your login e-mail address is not allowed from user profile. Please contact your portal admin or support to get help with that.

Favorites – Folders, Favorites – Smart folders

In *Favorites - Folders* you can add your favorite folders that you work with, for example on a regular basis. Same thing with *Favorites - Smart folders*.

Add favorite folders

1. Click on the button **Edit favorites**.
2. Click on the name of a workspace to see the folders you got permission to see and use.
3. Mark the checkboxes in front of the folders you like to add as favorites.
4. Click on button **Done** when you are finished.
5. Confirm dialog box with **Done** again. Now you can see the folders you have chosen below.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Add favorite Smart folders

1. Click on the button **Edit favorites**.
2. Click on the name of a workspace to see the Smart folders you got permission to see and use.
3. Mark the checkboxes in front of the Smart folders you like to add as favorites.
4. Click on button **Done** when you are finished.
5. Confirm dialog box with **Done** again. Now you can see the Smart folders you have chosen below.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Activity history

In *Activity history* you can see the history of events in the portal. For example, you can see what files that have been uploaded, edited or deleted. There also you see information about when it was done, and by whom. In the same way you can also see if a member has been added to the portal etc. To get more detailed information you can click on the button **+More** down to the right. Then you can also sort up to a selected date, and workspace (All or a particular workspace). If you hover over the file name you can see in what folder and workspace the file is located. If you click on the file name under the column *Subject*, you can choose if you want to **Preview** or **Open the file location** by clicking it. You can also see in what folder and workspace the file is located. If you click on **Preview** the viewer will open the file. If you click on **Open the file location**, you will be moved to the location of the object.

NOTE: In the list you can sort the events in ascending or descending order if you click at the column for example *Date* or *Description*.

NOTE: You can sort the events on date if you click up in the drop-down menu *Start date*. You can also sort on workspace if you click in the drop-down menu *Workspace* and choose one. You can reset your filter if you click on the button **No filter**.

Available labels

Here you can see all existing labels in the portal. If you want to use metadata, first the Portal administrator have to create/add labels to the portal. This is crucial for the system to find any folders or files in the future when you use metadata. Scroll down to see all existing labels.

Files

In the **Files** app you can create folders, change the name of documents and upload, share or delete documents from your document archive. You can also work with *Smart folders* and metadata, and restore files from the *Recycle bin* (depends on what permissions you got).

NOTE: If you want to, to simplify your work, you can download the application iCoordinator Web Extension. You will find it in Windows Store. It gives you the possibility to Check out and Check in documents and files. It will lock the files during editing, and after checking in the file, the version number will be increased. Read more about it in separate section here (länk till stycke om installation av Web Ext längre ned).

Workspaces

Here you can see the files that are stored for that particular workspace. Here you can create *New folders*, *Upload* files to the workspace, *Download* files to your local computer, *Checkout* and *Edit* your files, use metadata with *Labels*, *Share* your files and use the *Preview* function to see the file content inside **Files**.

NOTE: If you click on the cogwheel to the right of the columns, for example Changed, you will get more available columns to add or choose. You can add for example Comment and Uploaded, to get more information more easily about the files. Just mark the checkbox in front of the column you want to see or not.

Create new folder

You can get a nice structure on your files and documents by storing them in different folders, you can create new folders. Do like this:

1. Click on a *Workspace* under *Files*.
2. Click on the button **New folder**.
3. Fill in the name of the new folder in the field *Folder name*.
4. Click on the **Done** button.

If you regret your changes or you do not want to save the added/modified parameters, click on the **Cancel** button.

Upload files

1. Click on a *Workspace* under *Files*.
2. Click on the button **Upload**.
3. Choose *Select* in the drop-down menu, to choose what file to upload.
4. In the pop-up window *Upload file* click **Browse** and choose which file/s you want to upload. You can also choose to leave a comment about the version of the file.
5. Click on **Upload** and the file will be stored in the chosen folder or workspace.
6. Click on **Close** when you are done.

If you regret your changes or you do not want to save the added/modified
parameters, click on the **Cancel** button.

Upload files using Drag 'n drop

1. Click on a *Workspace* under *Files*.
2. Navigate to the location where you want to add files and folders.
3. Open a *Windows Explorer* window or *Finder* window in *macOS*.
4. Now you can choose files or folders to upload by using Drag n' drop-functionality.
   Drag n' drop the objects into the right part of the screen. **NOTE**: Please do not Drag
   n' drop to many objects at a time, approximately 500 MB would work fine. If you got
   more data to upload, then please divide it into smaller pieces. It can take some time
   until upload starts if you got much data, and also until objects show up after upload
   is finished.
5. You will now see some upload progress bars that indicates the progress for files. If
   you do not got permission to upload, you will see a message about that down to the
   right on the screen.
6. When the upload is done the objects will be stored in the chosen folder or
   workspace. Sometimes you need to reload page to see all objects.

Get folder inbound email address

This function can be used to email files directly into the specified workspace/folder. Useful
when you collaborate with external partners.

1. Click on a *Workspace* under *Files*.
2. Mark the folder or workspace you want to get the email link for.
3. Click on the button **Upload**.
4. Choose *Get email address* to get the email address to the workspace or folder.
5. In the pop-up window *Inbound email address* that opens you can now see the email
   address that you can use to copy by clicking at the button **Copy to Clipboard**, and
   use it to email files into the specified workspace/folder. Choose if you also want to
   save the email message too, you do that by marking the checkbox *Save message and
   attachments in separate folder*.
6. The pop-up window will close automatically.

If you regret your changes or you do not want to save the added/modified
parameters, click on the **Cancel** button.

Download files

1. Click on a *Workspace* under *Files*.
2. Mark the file you want to download.
3. Click on the button **Download** to save the file on your local computer.

4. Depending on what web browser you use and its settings, a pop-up window will open, and you need to decide where you want to save your copy of the file or folder. **NOTE**: If you download a folder or mark more than one file, it will be compressed and downloaded as a .zip file.
5. Click on the **Save** button.

If you regret your changes or you do not want to save the added/modified parameters, click on the **Cancel** button.

Edit files

First click on a *Workspace* under *Files*, then click on the button **Edit** and choose if you want to use *Cut, Copy, Paste, Delete, Rename, Checkout, Labels, Lock files on/off, Subscription on/off*, *Manage version* or *Manage permissions.*

Cut/Paste a file
1. Mark the file you want to cut.
2. Choose *Cut* to cut out the file.
3. Navigate to the place where you want to paste the file and choose *Paste*.

Copy a file
1. Mark the file you want to copy.
2. Choose *Copy* to copy the file.
3. Navigate to the place where you want to paste the file and choose *Paste*.

Delete a file
1. Mark the file you want to delete.
2. Choose *Delete* to delete a file.
3. In the pop-up window that shows, click **Yes** to verify that you want to delete the file. Otherwise click **Cancel**.
4. Click on the button **Done** to confirm.

Rename a file
1. Mark the file you want to rename.
2. Choose *Rename* to rename the file.
3. In the pop-up window that opens you can, depending on rights, change the name of the file in the field *Name*.
4. Click on the button **Done** when you are done.
5. Confirm dialog box with **Done** again.

Checkout a file
1. Mark the file you want to Check out.
2. Click on the button **Checkout**.
3. Click **Open** when the dialog window appears, which asks if you want to open the file with the extension, you can check the box if you want your choice to be saved (in some web browsers you must also allow Pop-up windows). Once

done, the file will be downloaded to your *Checked out files* folder. Click **Cancel** if you rather want to cancel.

4. In the next dialog window, select the program with which you want to open the file (for example Word) and click **OK**. Check the box if you want the operating system to remember your choice, to avoid choosing each time.

5. Start editing the file.

Check in a file

1. When you have finished editing and clicked **Save** in for example Word, a dialog window appears down right after a few seconds, where you can choose whether you want to **Check in** the file, or if you want to **Update file and continue working**.

2. If you click **Check in** without closing the file first, a dialog window opens, and you are prompted to close the file. Close file and click **Retry**. The file is now deleted from your local folder and will be uploaded again to the server. Also note that the version number will be increased.

Manage labels

The labels you choose to add here, you can use when creating *Smart folders*, which provides ability to sort out files that got labels attached on them. **NOTE**: The *Portal administrator* needs to add some *Labels* to the portal before you can add any to a file or folder. That can be done in the app *Admin*, under the function *Labels*.

1. Mark the file you want to manage labels for.

2. Choose *Labels* to manage labels for the file.

3. In the pop-up window that opens you can choose to add labels if you choose *Select*.

4. Now you need to choose what type of label you want to add. You can choose that in the drop-down menu *Label*. **NOTE**: The *Portal administrator* needs to add some *Labels* to the portal before you can add any to a file or folder. That can be done in the app *Admin*, under the function *Labels*.

5. Depending on the type of label, you maybe have to edit a value in the field *Value*, or choose one in the drop-down menu.

6. Click on the button **Add** to add the label.

7. If you want to edit you can click on the Pencil-symbol and make your changes up in the field *Value* and click on the button *Update*. When you are done, click on the **Save** button.

8. You can also choose to delete a label if you mark the label and click the Trash Bin-symbol.

9. Click on the **Save** button.

   If you regret your changes or you do not want to save the added/modified parameters, click on the **Cancel** button.

Lock files on/off for editing

If you want to be sure that no one is working with the same file as the one you are going to edit, you can choose to lock the file for editing first. If someone then tries to upload a new version of the file, a message will show, saying that the file is locked, and can only be opened for reading. If you hover the mouse over the icon in the column *Status*, you can see information about when the file was locked, and what user that locked it. To lock a file for editing, do like this:

1. Mark the file you want to lock or unlock for editing.
2. Choose *Lock files on/off* to lock or unlock a file for editing.
3. When a file is locked, an icon should be visible to the right in the column *Status*.
4. Do the same to unlock a file.

Subscribe on files

If you subscribe on a file or a folder, you will once a day get an email when anyone upload a new version of the file. **NOTE**: You can change this setting to *Instantly*, in *My profile/Edit profile/Subscription*.

1. Mark the file you want to subscribe or unsubscribe.
2. Choose *Subscription on/off* to subscribe or unsubscribe on a file.
3. When you have subscribed on a file an icon should be visible to the right in the column *Status*.

Manage versions

The version numbering of files works this way: The first version that is created/uploaded will get the version number 1. The number is then increased automatically for every new version of the file that is uploaded (1 -> 2 -> 3 -> 4 etc.). If you upload a file with exactly the same name, it will get a new version number.

1. Mark the file you want to manage versions for.
2. Choose *Manage version* to manage versions for the file.
    2.1. On the left, select the file that you want to open the previous version of (if there is any).
    2.2. Click on the button **Preview** to preview the file.
    2.3. Depending on what web browser you use and its settings, a new tab will open to show the content of the file. If not shown, you must check your web browser settings, or the file format is not supported by the in-built viewer.
    2.4. You can also click on the button **Download**, a pop-up window will open, and you must decide where you want to save your copy of, for example the earlier version of the file. You can also often choose if you want to open the file instead.
    2.5. Here you also can add, and **Edit comment** on a version. Do not forget to save with **Done**. Confirm with **Done** again.
    2.6. Click on the button **Cancel** when you are done.

    NOTE: In the bottom of the pop-up window you can see the versions of the file, and in the columns see who made the latest edit/upload of the

file version. You can also see a comment (if there is any) and what date
and time the file was updated.

Manage permissions

Under *Manage permission* you can see the current permission for the file or folder. If
there are any users or groups having permissions, you can see them and their
permissions in the pop-up window *Manage permission,* after choosing what file/folder
to manage. You can also quickly change the permissions for that user or group, just by
clicking and mark the checkbox next to the desired permission and click on the button
Done when you are done. **NOTE**: The Admin/s in the workspace cannot change
her/his own settings. That is normal.

1. Mark the file or folder you want to see the permissions for.
2. Click on the button *Edit* to add permission for that file or folder.
3. Choose *Manage permission*.
4. In the pop-up window *Manage permission* that opens you can select which
   user you want to add/change a permission for in the columns. You can also
   filter on *Name* or *E-mail*, or use filter such as: *No filter*, *Show users that can
   edit*, *Who can give me Edit permissions?* or *Show groups*.
5. You can choose what permissions you want to add/change with the
   checkboxes. Choose between *None*, *Read*, and *Edit*. Depending on permissions
   set you can mark the checkboxes *Can grant others to read* or/and *Can grant
   others to edit*. **NOTE**: You cannot change them unless the user or group got at
   least the permission *Read*. Then you can choose *Can grant others to read*. If
   the user/group got the permission *Edit* you also can choose *Can grant others
   to edit.* You can choose one or several at the same time.
6. When you are done with your choices click on the button **Done**.
7. Confirm dialog box with **Done** again.

Share files

Click on a *Workspace* under *Files*. Then click on the button **Share** and choose if
you want to change *Link access level* or *Send link*.

Change *Link access level*

1. Mark the file you want to publish.
2. Choose *Link access level* to choose the level you want to use to publish
   the file.
3. In the drop-down menu that opens you have several choices how you
   want to publish. Select what type of access you want to allow for the
   selected file. Possible values are: *Anyone*, *Portal members* and *None*.
   Selecting *None* will unshare the file.
4. When you have added a *Link access level* on a file you will see an icon to
   the right in the column *Status*.

Send link

1. Mark the file you want to send a link to.
2. Choose *Send link* to send a link to the file. **NOTE**: The choice will be grayed out and unavailable until you have set the *Link access level* to either *Anyone* or *Portal members*.
3. In the pop-up window *Send link* you can now choose a portal member in the field *Enter email*, or click on the button **Add External Email** and enter the email address in the field *External email* if you want to send it to anyone. Then you can click the button **Add Mail**. You can also enter a message in the field *Message* if you want to.
4. When you are done, click on the button **Done** to send link.
5. Confirm dialog box with **Done** again.

Copy link

1. Mark the file you want to copy a link for.
2. Choose *Copy link* to copy a link to the file. **NOTE**: The choice will be grayed out and unavailable until you have set the *Link access level* to either *Anyone* or *Portal members*.
3. In the pop-up window *Shared link for* you can now mark and copy the URL address in the field, and if you want also copy the link to the clipboard, if you click the button *Copy link*.
4. Confirm dialog box with **Done**.

Preview files
1. Click on a *Workspace* under *Files*.
2. Mark the file you want to preview.
3. Click on the button **Preview** to use the built-in viewer.
4. A new tab or window will open in your web browser, load the file and the file will be previewed. The behavior of the web browser can differ depending on what web browser you use and the settings you got.
5. Close the web browser tab/window with **X** when you are done.

Smart folders

Here you can see the files that are stored for that particular workspace. Here you can create *New folders*, *Upload* files to the workspace, *Download* files to your local computer, *Checkout* and *Edit* your files, use metadata with *Labels*, *Share* your files and use the *Preview* function to see the file content inside **Files**.

Create a new smart folder
1. Click on a *Workspace* under *Smart folders* in *Files*.
2. Click on the button **New Smart folder**.
3. Enter the name of the new smart folder in the field *Name* in the pop-up window *Add Smart folder*.

4. Select a *Label* you want to use in the drop-down menu. **NOTE**: The *Portal administrator* need to add some *Labels* to the portal before you can choose any. That can be done in the app *Admin*, under the function *Labels*.
5. Choose an *Operator* in the drop-down menu.
6. Add a value in the field *Value*. **NOTE:** If you got a label of type *List* with added options, you will get several options in the field *Value*. Choose one of them.
7. Click on the button ***Add*** when you are done. You can add several criteria's.
8. Click on the **Save** button when you are done.
9. Confirm dialog box with **Done**.

If you regret your changes or you do not want to save the added/modified parameters, click on the **Cancel** button.

Download content in a smart folder

1. Click on a *Workspace* under *Smart folders* in *Files*.
2. Click on the smart folder and mark the files you want to download. **NOTE**: The smart folder will only contain any file, if the criteria will align with the label on the file(s), otherwise it will be empty.
3. Click on the button **Download** to download the files.
4. Depending on what web browser you use and its settings, a pop-up window will open and you have to decide where you want to save your copy of the file(s).
5. Click on the **Save** button.

If you regret your changes or you do not want to save the added/modified parameters, click on the **Cancel** button.

Edit a smart folder

1. Click on a *Workspace* under *Smart folders* in *Files*.
2. Mark the smart folder you want to edit.
3. Click on the button **Edit** and choose if you want to *Configure* or *Delete* smart folder.

Configure a smart folder

1. Choose *Configure* to edit the Smart folder.
2. Here you can change name in the field *Name* in the pop-up window.
3. You can add new criteria's you want to use. Choose what label format you want to add in the drop-down menu *Label*. After that you can edit *Operator* and *Value* in the drop-down menus. Click on the button ***Add*** *when you are done*. **NOTE:** If you got a label of type *List* with added options, you will get several options in the field *Value*. Choose one of them.
4. If you want to edit an existing criteria you can click on the Pencil-symbol and make your changes up in the criteria's, and click on the button **Update** when you are done.
5. You can also delete a criteria by clicking on the Trash Bin-symbol for that criteria.
6. Click on the **Save** button when you are done.

Delete a smart folder

1. Mark the smart folder you want to delete.
2. Choose *Delete* to delete the smart folder.
3. In the pop-up window that shows, click **Yes** to verify that you want to delete.

If you regret your changes or you do not want to save the added/modified parameters, click on the **No** button.

Open file location

If you want to know where the file is located, you can use this button.

1. Click on a *Workspace* under *Smart folders* in *Files*.
2. Double click on the smart folder you want to open.
3. Mark the file you want to open the location for.
4. Click on the button **Edit**.
5. Choose *Open file location*.
6. You will now end up in the location where the file is located.

Preview content in a smart folder

1. Click on a *Workspace* under *Smart folders* in *Files*.
2. Double click on the smart folder you want to open.
3. Mark the file you want to preview.
4. Click on the button **Preview** to use the built-in viewer.
5. A new tab or window will open in your web browser, load the file and the file will be previewed. The behavior of the web browser can differ depending on what web browser you use and the settings you got.
6. Close the web browser tab/window with **X** when you are done.

Recycle bin

When you remove files and folders from the application *Files*, they are moved to the *Recycle bin*. You can find the objects there as long as the Recycle bin is not permanently deleted.

Empty recycle bin

1. Click on *Recycle bin* under *Files*.
2. If you want to empty the recycle bin only for this particular workspace, you can click on the button **Empty trash bin for current workspace**. **NOTE**: The content cannot be restored after you have emptied the recycle bin and will be deleted permanently. You can only delete files and folders if you got the permission to do it, or if you are the owner of the files. It is only the *Workspace administrator* and the *Portal administrator* that has the permission to empty the recycle bin for the current workspace.
3. If you want to empty the entire recycle bin, you click on the button **Empty trash bin for entire portal. NOTE**: The content cannot be restored after you have emptied the recycle bin and will be deleted permanently. You can only delete files and folders if you got the permission to do it, or if you are the owner of the files. It is only the *Portal administrator* that has the right to empty the entire recycle bin.

4. In the pop-up window that shows, click **Yes** to verify that you want to empty the recycle bin.
5. Confirm dialog box with **Done**.

If you regret your changes or you do not want to save the added/modified parameters, click on the **No** button.

Edit recycle bin
1. Click on *Recycle bin* under *Files*.
2. Mark the files and/or the folders you want to edit.
3. Click on the button **Edit** and choose if you want to *Restore* or *Permanent delete*.

Restore files/folders
1. Click on the button *Restore* to restore the files or folders to their original locations. **NOTE**: If an object with the same name already exists in the folder, see instruction below.
2. The files/folders will now be restored to the location they had before deletion.
3. Confirm dialog box with **X**.

Restore files/folders if an object with the same name already exists in the folder
1. Click on the button *Restore* to restore the files or folders to their original locations. **NOTE**: If an object with the same name already exists in the folder, mark the checkbox for that object and click on the button **Restore selected** to try to restore the file to the new location.
2. You will now be given the possibility to change the target folder for that object to another location. Choose another folder and click on the button **Restore**. The restore will be confirmed with the text *Success* in the column *Status*.
3. Close the window with **X**.

Delete the files/folders permanently
1. Click on the button *Permanent delete* to delete the files/folders.
2. In the pop-up window that shows, click **Yes** to verify that you want to delete the files/folders permanently.
3. Confirm dialog box with **Done**.

If you regret your changes or you do not want to save the added/modified parameters, click on the **No** button.

iCoordinator Web Extension
To make it easier to work with files via your web browser, you can install *iCoordinator Web Extension* on your computer. This add-on application can be installed via *Windows Store* on the most common browsers on the market and for Windows 10 and 11 computers only on PC. Also, for macOS 10.8 or later you can find it at *App Store*.

iCoordinator Web Extension application installation

You can find *iCoordinator Web Extension* in the *Windows Store* on your computer. Search for "*iCoordinator Web Extension*" and click *Download*. Choose whether to log in or just use it on that device (if you click *No thanks* or click *X*). The extension is first downloaded and then installed. Click *Start* to start the extension. In future computer startups, the add-on will start automatically along with the operating system.

Starting up with iCoordinator Web Extension application

The default setting is that *iCoordinator Web Extension application* starts up automatically along with the computer's operating system. If necessary, click the *iCoordinator Web Extension* icon to start the extension manually (for example, if you have closed it). Depending on the operating system, you will find the icon in the *Start menu*, or even you may also find the icon among other apps (in *Panels*).

NOTE: At the first start up (often after you have double clicked a file and have chosen *Checkout*) you must fill in your login credentials (*Username* and *Password*) in the window that appears. These are the same login credentials that you use to log in via the web browser. After that *iCoordinator Web Extension* will autostart together with your operating system and will be ready when you *Check out* a file.

After launching the *iCoordinator Web extension*, you will see an icon down right in the taskbar. If you right-click the icon, you can select *Open* and *Exit*.

NOTE: If you do not see the icon at the bottom of the Windows taskbar, you may need to click the "Show hidden icons" arrow in the taskbar to see it in the *Message bar*. Depending on your settings, how this is displayed may vary between different computers.

iCoordinator Web Extension installed *Yes* or *No*?
If you double click on a file and do not have the application installed, you will get a 3-button dialog window where you can choose **Download**, **Preview** or **Checkout**. The first time you click **Checkout** you will get another dialog window asking if you got the application installed *Yes* or *No*. You need to answer (if you mark the checkbox the web browser will remember your choice), if you answer *Yes* you get another dialog window asking if you want to give permission to let the web site to open the application. Mark the checkbox and click **Open iCoordinator Web Extension**.

When you click **Open** you can choose with what program you want to open the file, for example *Word*. Of course, this depends on what programs you got installed (in some web browsers you also must allow pop-up windows, for the file to be opened).

If you click *No*, the *Windows Store* page opens instead so that you can download the extension (usually the *Windows Store* opens locally when you click on the browser link).

Manage files

Check out a file

1. Double click a file in the *Files* document library (or use the **Checkout** button located on the toolbar).

2. Click the button **Checkout**.

3. Click **Open** when the dialog window appears, which asks if you want to open the file with the extension, you can check the box if you want your choice to be saved (in some browsers you must also allow Pop-up windows). Once done, the file will be downloaded to your local *iCoordinator Web Extension\Files*-folder found under *Downloads*. Click **Cancel** if you rather want to cancel.

4. In the next dialog window, select the program with which you want to open the file (for example Word) and click **OK**. Mark the checkbox if you want the operating system to remember your choice, to avoid choosing each time. Often you need to *Enable editing* to be able to edit the document in the program.

Check in a file

1. When you are finished editing and click *Save* for example in *Word* or closing the window, a dialog window appears down right after a few seconds, where you can choose whether you want to **Check in** the file, or if you want to **Update file and continue working**. If you click on **X** to close, for example in *Word*, you will sometimes first need to choose where you want to save the file, then just click **Save** in the dialog window that shows, if you want to check in the file to the portal.
2. If you click **Check in** without closing the file first, a dialog window opens, and you are asked to close the file. Closen the file and click **Retry**. The file will now be deleted from your local folder and uploaded again to the server. Also note that the version number will be increased.

When you have checked out a file, a menu with buttons appears inside the web extension under *Checked out files*.

Open a file

1. You can use this **Open** button to open a downloaded local copy.
2. After clicking, in the dialog window you can (in some cases, and if you have not selected it before) select which program you want to open the file with (for example *Word*) and click **OK**. Now you can edit the file.

Open with

1. You can use the button **Open with** to select which application you want to use to open an already downloaded local copy.
2. After clicking, in the dialog window you can choose which program you want to open the file (for example *Word*) and click **OK**. Check the box if you want the operating system to remember your choice. Now you can edit the file.

Check in a file

1. The button **Check In** is used to check in the file again.
2. Click on **Check in** to check in the file and a new version will now be uploaded to the portal. The file is also deleted in your local *Checked out files* folder and the lock icon displayed in the web browser now disappears. If you still have the file open when you click **Check In**, you may get a message asking you to close the open file first. Do so and then click **Retry** to check in the file.

Update and continue working

1. You can use the button **Update and continue working** to save a new version of your file to the portal, and then continue working with the file.
2. Click **Update and continue working** and then a new version will be uploaded to the portal while the file remains open locally and you can continue working with it. The file also remains local, and the lock icon continues to appear in the web browser.

Delete local copy

1. This button **Delete local copy** is used to delete the file locally from your computer.
2. Click **Delete local copy** to delete the file locally. The file is deleted from your local *iCoordinator Web Extension\Files*-folder found under *Downloads,* and the lock icon displayed in the web browser disappears. If you still have the file open when you click **Delete Local Copy**, you may see a message asking you to close the open file first. Do so and then click **Retry** to delete the local copy.

Settings

In the web browser extension *iCoordinator Web Extension*, you can find **Settings**. Under **Settings** you can change, for example, language and where you want to save the files locally. There you will find *Language*, *Startup*, *Local files folder path* and *Logout*.

You will also find the version number at the bottom to the right.

Change language

1. Click on the drop-down menu under **Language** to be able to change the language between *Swedish* and *English*.
2. Select one of the options by clicking on it.

Change startup

With the selector under **Startup**, you can choose whether you want the add-on to startup together with your operating system. This means that the web extension window will be displayed from the start. Though, the web extension will be started automatically when you for e.g. *Check out* a file also if you choose to keep the setting *Off*.

1. Click the selector under **Startup** to select whether you want the web extension to startup together with your operating system.
2. Switch between *On* and *Off* to change the setting.
3. If the operating system asks you in a dialog window, if you want to run the activity, click **Activate, Run** or similar.

Change Local files folder path

With this feature, you can choose where you want to save your files locally on your computer. The path will always end with "iCoordinator Web Extension \ Files".

1. Click the **Browse** button under *Local files folder path* to select a new location for storing files locally on your computer.
2. Navigate to the storage location and click *Select folder* to save. Click *Cancel* to undo and cancel.
3. Make sure the path shown is changed.

Logout

1. Click the **Logout** button to log out of the account.
2. You will need to log in to your account again, to be able to use the extension / app.

Supported platforms

The *iCoordinator Web Extension* runs on Windows version 10 version 17134.0 or later.

The *iCoordinator Web Extension* runs on both 32 and 64 bit architecture.

Requires approx. 30 MB hard disk space for installation (applicable to Windows version).

The *iCoordinator Web Extension* runs on macOS version 10.8 or later.

Members

Here you can view the members of the workspaces. You can also see the existing information about the members here, like *Name*, *Title*, *E-mail*, *Workspace permission*, *Address* and *Telephone*. Just click on the name of the workspace where you want to see who the members are. **NOTE**: You can only see the workspaces that you are a member of.

Admin

In **Admin** app you can you can invite, administrate and see the *Portal members* of the whole portal, you can manage *Workspaces* and users, and manage *Labels* and *Groups*.

NOTE: Only Portal administrators can see all functions. For example, a regular user cannot see the whole list of *Portal members*, and only the members and workspaces of which they are members.

Portal members

Here you can manage the members of the portal. You can invite new members and administrate.

NOTE: Only Portal administrators can see all functions. For example, a regular user cannot see the list of Portal members, and only the members and workspaces of which they are members.

Manage permissions

1. Click on the button **Manage permissions**.
2. In the pop-up window *Manage portal permissions* that opens you can select which user you want to change a permission for in the columns. You can also sort on *Name* or *E-mail*. You can choose what permissions you want to change by clicking in the checkboxes. Choose between *Access*, *May invite*, and *Admin*.
3. Click on the button **Update** when you are done.

If you regret your changes or you do not want to save the added/modified parameters, click on the **Cancel** button.

Manage allowed clients

1. Click on the button **Manage allowed clients**.
2. In the pop-up window *Manage allowed clients* that opens, you can select which user you want to change a permission for using the mobile client, in the columns. You can also sort on *Name*, *E-mail* or *Actions*. You can choose what permissions you want to change by clicking in the checkboxes. Choose between on or off for *Mobile*.
3. Click on the button **Update** when you are done.
4. Confirm dialog box with **Done** again.
5. You can also use the button **Allowed clients** out to the right in the column *Actions*, in the same row for that user. Just uncheck or check the checkbox in the pop-up window, and then click **Done**.

If you regret your changes or you do not want to save the added/modified parameters, click on the **Cancel** button.

Invite new member

1. Click on the button **Invite** under **Portal members**.
2. Fill in the information for *First name*, *Last name*, *E-mail* in the pop-up window *Invitation - Invite user*, and click on the button **Add**. If you want to do some changes

you can click on the pencil-icon to the right. Then you can edit and click **Update** when you are done.

3. Now you can choose *Workspace membership* if you want to invite a member to one or more workspaces at the same time. You can also add the new member to workspace groups if there are any. **NOTE**: The *Portal admininistrator* must create a workspace group before you can use this option. This can be done in **Groups**. Workspace groups enables the possibility to give a user access to workspace folders as soon as the user accepts an invitation. This depends on if you have given the group any permissions. **NOTE**: Use the up- and down arrows to the right in the window to show all the workspaces and the existing groups. Use the checkboxes to choose which workspace/s and group/s the user will become a member of. Remember that first you got to mark a workspace containing groups, to see them.
4. Click on the button **Invite** when you are done.
5. Confirm dialog box with **Done**. Now the invitation e-mail will be sent out, and you can now find the user invitation under *Invitations*.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Delete member
1. Click at the button **Delete** out to the right in the column *Actions*, in the same row for that user.
2. In the pop-up window *Confirmation* that shows, click **Yes** to verify that you want to delete the user.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Invitations

In **Invitations** you can see if you have invited a new member to the portal, resend an invitation and remove an invitation. Also, you can use the button **Invite** to invite new members to the portal, in the same way as under Portal members.

NOTE: Only Portal administrators and the user/s given the permission *May invite* that can administrate and view **Invitations**.

Invite new member
1. Click on the button **Invite** under **Portal members**.
2. Fill in the information for *First name*, *Last name*, *E-mail* in the pop-up window *Invitation - Invite user*, and click on the button **Add**. If you want to do some changes you can click on the pencil-icon to the right. Then you can edit and click **Update** when you are done.
3. Now you can choose *Workspace membership* if you want to invite a member to one or more workspaces at the same time. You can also add the new member to workspace groups if there are any. **NOTE**: The *Portal administrator* must create a

workspace group before you can use this option. This can be done in **Groups**. Workspace groups enables the possibility to give a user access to workspace folders as soon as the user accepts an invitation. This depends on if you have given the group any permissions. **NOTE**: Use the up- and down arrows to the right in the window to show all the workspaces and the existing groups. Use the checkboxes to choose which workspace/s and group/s the user will become a member of. Remember that first you got to mark a workspace containing groups, to see them.

4. Click on the button **Invite** when you are done.
5. Confirm dialog box with **Done**. Now the invitation e-mail will be sent out, and you can now find the user invitation under *Invitations*.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

When the person has accepted your invitation, the user will disappear from this list and will be displayed under *Portal members* instead. In this list you can see *Name*, *E-mail* and *Invitation last sent, Invited by* and *Actions*. You can also resend the invite if you click on the button **Resend**. Under the column *Actions* you can also remove the invitation by clicking the button **Remove invitation**. **NOTE:** It is only the user/s given the permission *Admin* or *May invite* that could administrate this.

Resend invite

1. You can also resend the invite if you click on the button **Resend**.
2. In the pop-up window *Confirmation* that shows, click **Done** to verify that you want to resend the invitation to the user.
3. Confirm dialog box with **Done** again. Now the invitation e-mail will be sent out again.

NOTE: It is only the user/s given the permission *Admin* or *May invite* that could administrate this.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Remove invititation

1. You can also remove the invitation by clicking the button **Remove invitation** under the column *Actions* to the right, in the same row as for that user.
2. In the pop-up window *Confirmation* that shows, click **Yes** to verify that you want to remove the invitation for the user.
3. Confirm dialog box with **Done** again.

NOTE: It is only the user/s given the permission *Admin* or *May invite* that could administrate this.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Labels

If you want to use metadata, first you have to create/add labels to the portal. This is crucial for the system to find any folders or files in the future when you use metadata. In *Labels* you can also edit your existing labels in the future. When you assign labels to folders and files in the app **Files** you will choose labels based on this first step. **NOTE:** It is only the user/s given the permission *Portal administrator* that could administrate this.

Add labels

1. Click on the button **Add**.
2. Fill in the name of the label in the field *Name* in the pop-up window *Label*.
3. In the drop-down menu *Format,* choose the type of labels you want to add. You can choose between *String*, *Number*, *List* and *Date*. **NOTE**: *List* gives you the possibility to create several different choices. Click in the bottom field *List items* that will show and add the choices with the button **Add**. You can always remove choices by clicking the *Trash bin*-icon.
4. Click on the **Done** button to save.
5. Confirm dialog box with **Done** again.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Edit labels

1. You can edit a label by clicking the button **Edit** under the column *Actions* to the right, in the same row as for that label.
2. In the pop-up window *Label*, you can choose if you want to edit the field *Name* or *List items*. **NOTE**: Editing the field *List items* is only possible if the label got the format *List*.
3. Click on the **Done** button when you are done.
4. Confirm dialog box with **Done** again.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Delete labels

1. You can delete a label by clicking the button **Delete** under the column *Actions* to the right, in the same row as for that label.
2. In the pop-up window *Confirmation* that shows, click **Yes** to verify that you want to delete.
3. Confirm dialog box with **Done** again.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Workspaces

Here you can manage your workspaces and create new ones. You can *Copy*, *Rename* and *Remove* workspaces. Also, you can manage the members of the workspace. You can *Add user,* also administrate members, for example *Remove user from workspace* or manage *Workspace permissions*.

Create new workspace

1. Click on the button **New workspace**.
2. Enter the name of the new workspace in the field *Name* in the pop-up window *Add new workspace*.
3. Choose if you want yourself to be added to the created workspace, by checking the checkbox *Yes*.
4. Click on the **Done** button when you are done.
5. Confirm dialog box with **Done** again.
6. Click on the left side of the screen, on the name of the newly created workspace, if you want to administrate it.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Copy workspace

1. Click on the button **Copy workspace**.
2. Select which workspace you want to copy in the *Select a workspace to copy* field in the pop-up window *Copy workspace*.
3. Enter the name of the new workspace in the field *Name*.
4. Select the areas that you want to copy by checking the corresponding checkboxes under *Areas to copy*.
5. Click on the **Create** button.
6. Confirm dialog box with **Done**.
7. After a little while (depending on how much data the copied workspace contained) you will receive an e-mail confirming that *Workspace was successfully created*.

NOTE: We recommend that you do **NOT** start working with the new cloned workspace until you have received the e-mail, since any changes made during a running copy process might cause errors.

Please note regarding Copy workspace:

a) The area *Permissions* cannot be selected unless either or both *Members* or *Groups* are selected as well as *Folder structure*.
b) The areas *Files* and *Labels* cannot be selected until the area *Folder structure* is selected.
c) You will receive an e-mail when the copy process is finished. We recommend that you do **NOT** start working with the new cloned workspace until you have received the e-mail, since any changes made during a running copy process might cause errors.
d) There is a limit on 1000 Folders/Files objects that can be copied in the *Copy workspace* function.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Add user

1. Click on the name of the workspace you want to edit in the list to the left in the screen.
2. Click on the button **+ User** to add a user.

Add user

1. In the drop-down menu *Select user,* choose the member you want to add to the workspace.
2. In the drop-down menu *Select permissions,* choose the permission you want to add for the user. Choose between *Access*, *May invite* and *Admin*.
3. Click on the **Done** button.
4. Confirm dialog box with **Done**.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

NOTE: Only Portal- and Workspace administrators can add users to workspaces.

Edit workspace

1. Click on the name of the workspace you want to edit in the list to the left in the screen.
2. Choose if you want to create *New workspace*, *Copy workspace*, *Rename workspace*, *Remove workspace*, change *Workspace permissions* or *Remove user* from workspace.

Create new workspace

1. Click on the button **New workspace**.
2. Enter the name of the new workspace in the field *Name* in the pop-up window *Add new workspace*.
3. Choose if you want yourself to be added to the created workspace, by checking the checkbox *Yes*.
4. Click on the **Done** button when you are done.
5. Confirm dialog box with **Done** again.
6. Click on the left side of the screen, on the name of the newly created workspace, if you want to administrate it.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Copy workspace

1. Click on the button **Copy workspace**.
2. Select which workspace you want to copy in the *Select a workspace to copy* field in the pop-up window *Copy workspace*.
3. Enter the name of the new workspace in the field *Name*.

4. Select the areas that you want to copy by checking the corresponding checkboxes under *Areas to copy*.
5. Click on the **Create** button.
6. Confirm dialog box with **Done**.
7. After a little while (depending on how much data the copied workspace contained) you will receive an e-mail confirming that *Workspace was successfully created*.

NOTE: We recommend that you do **NOT** start working with the new cloned workspace until you have received the e-mail, since any changes made during a running copy process might cause errors.

Please note regarding Copy workspace:

a. The area *Permissions* cannot be selected unless either or both *Members* or *Groups* are selected as well as *Folder structure*.
b. The areas *Files* and *Labels* cannot be selected until the area *Folder structure* is selected.
c. You will receive an e-mail when the copy process is finished. We recommend that you do **NOT** start working with the new cloned workspace until you have received the e-mail, since any changes made during a running copy process might cause errors.
d. There is a limit on 1000 Folders/Files objects that can be copied in the *Copy workspace* function.

If you regret your changes or you don't want to save the added/modified parameters, click on the **Cancel** button.

Rename workspace
1. Click on the button **Rename workspace** to change the name of the workspace.
2. Fill in the new name in the field *Name* in the pop-up window.
3. Click on the **Done** button.
4. Confirm dialog box with **Done**.

Delete workspace
1. Click on the button **Remove workspace** to delete the workspace.
2. In the pop-up window *Confirmation* that shows, click **Yes** to verify that you want to delete.
3. Confirm dialog box with **Done**.

Manage permissions for users
1. Click on the button **Workspace permission** to change the permission for the users.
2. In the pop-up window *Manage workspace permissions,* choose the permission you want to change for that user. Choose between *Access*, *May invite* and *Admin*. **NOTE**: In the column *Actions*, the checkboxes shows the current permission for the users. The different permissions are: *Access* = The user got access to the workspace. (please note that you must set permissions on folders and files in that particular

workspace, if the user should have the possibility to read/edit any folders and files. This is done in the **Files** app). *May invite* = Access permission + the user got the permission to invite new members to the workspace. *Admin* = The user got all the permissions in the workspace.

3. Click on the button **Done** when you are done.
4. Confirm dialog box with **Done**.

NOTE: You can also click on the button **Permission** under the column *Actions* to the right, in the same row as for that user, to manage permission for that user. Choose the permission and click **Done**.

Remove a user from workspace

1. Click on the button **Remove user** under the column *Actions* to the right, in the same row as for that user, to remove a user from the workspace.
2. In the pop-up window that shows, click **Yes** to verify that you want to remove.
3. Confirm dialog box with **Done**.

If you regret your changes or you don't want to save the added/modified parameters, click on the **No** or **Cancel** button.

Groups

Here you can see all the groups in the portal. You also can see existing members in the groups. Click at *Groups* to view and show the workspaces that got existing groups. Click on the name of the workspace to see the existing groups.

Add a new Workspace group

1. Click on the workspace where you want to add a new group.
2. Click on **Add group**.
3. Fill in the name of the new group in the field *Name*.
4. If you are satisfied with the information, click on the button **Done**. You can cancel with the button **Cancel**.
5. Confirm dialog box with **Done** again.

Remove group

1. Click on the button **Remove** for the group you want to remove.
2. Click on the button **Yes**. You can cancel with the button **Cancel**.
3. Confirm dialog box with **Done** again.

Rename group

1. Click on the button **Edit group name** for the group you want to rename.
2. Fill in the new name of the group in the field *Edit name*.
3. If you are satisfied with the information, click on the button **Done**. You can cancel with the button **Cancel**.
4. Confirm dialog box with **Done** again.

View group members

1. Click on the button **View group members** for the group you want to look at.
2. Click on the button **Done** or the button **Cancel** when you are done.

Add member

1. Click on the button **Edit group members** for the group you want to edit.
2. In the pop-up window *Manage group members* that opens, click on the users you want to add to the group. Note that they will be marked in green. You can also see a little tick to the right. If you click again on that user, the user will be unselected.
3. Click on the button **Done** when you are done.
4. Click on **Cancel** if you do not want to save.

NOTE: In the list of user you can sort the members in ascending or descending order if you click at the column for example *Name*. You can also use the buttons **Previous** and **Next** to see next page with members, or you can expand the rows to see more members at the same time by using the down arrow to the right of *20 Rows* in the bottom.

Search

The *Search* function in the portal can be used to search files. The *Search* function is found at the top right corner of the window.

To *Search*, just type in the file name you want to search for and click on the button **Search**. Then the window *Search result* opens, where your search hits will show up. You can now choose to mark a file and click the button **Download** and download it to your local computer. Otherwise you can preview the file by clicking the button **Preview**. You can close the window when you are done by changing to another area, for example *Home or Files*.

NOTE: You can change the sorting in the columns. In the list below you can sort the search hits in ascending or descending order if you click at the name of the columns, for example *Name*. You can go back and forth in the list with the buttons *Previous* and *Next*, if there are many objects. But you can also add more *Rows* if you want, to see more objects at the same time.

Permissions

(WS = Workspace)

Portal permissions:

Access	Is member of the portal and can be added to WS:s within the portal.
May invite	Is member, Access + can invite others to the portal.
Portal admin	Is member, can invite and can create Workspaces, create Labels etc.

WS permissions:

WS Access	Is member of the WS and got access to it.
WS May invite	Is WS member + Can invite others to this WS.
WS Admin	Is WS member, access to everything within the WS.

File & Folder permissions:

None	User does not have access to the object.
Read	User can access the object (file or folder), but not update it/upload new version.
Edit	Read + User can access and write/edit content to the object.
Can grant others to Read	Read + permission to give other users Read & Grant Read permissions to the object.
Can grant others to Edit	Read + Edit + grant Read + permission to give other users Edit and Grant Edit permissions to the object.

Misc. info:

- File & folder permissions can be set for a user or a (workspace) group.
- To give access to a file, use this process:

  1. User is invited to the portal and accepts it.
  2. The user is added to a workspace.
  3. File/folder permissions are set to *Read* or *Edit* for the user.

- A Portal administrator does not have default access to all workspaces (but he/she can add him/herself as a member of any workspace).
- A user with workspace access does not have default access to content in the workspace, and need to get some file/folder permissions set first.
- Files and folders inherits permissions from the parent folder.
- Inherited permissions can be overridden by setting permissions explicitly for that object.
- Explicitly set permissions overrides inherited permissions (for example if the user is also a member of a group, then it overrides).

Mobile app

An app for mobile devices

In this *iCoordinator* app for mobile devices, you can access your portals and workspaces. You can also read, view, upload and manage the files in the portal and workspaces. **NOTE**: You can always navigate back in the app by clicking in the upper left corner of the screen, or you can navigate up by clicking the *Up to "name of the workspace"* button above the files and folders.

NOTE: If you do not have any portal yet you need to use the button **Sign Up** to first of all create an account and a new portal before you can use the app.

NOTE: You can choose how much storage the app can use. On Android devices, inside the app you click on the three dots up in the right corner. Then choose *Settings*, there you can set the amount of storage used by the app. If you want to change, click on the amount of storage to the right and choose the new value. Remember that this may be limited by the storage capacity of your device.

On iOS devices, you first choose *Settings* for your iOS, and there you look for the iCoordinator app. If you click on that you will see *File storage* in the bottom. If you want to change, click on the amount of storage to the right and choose the new value. Remember that this may be limited by the storage capacity of your device.

Select Portal

This will only occur if you got several portals connected to your user account/email address. Here you can choose in what portal you want to work. Just click on the portal you want to access.

Select Workspace

This will only occur if you got any workspaces connected to your user account/email address. Here you can choose in which workspace you want to work. Just click on the workspace you want to access.

Manage files

This only would occur if you got any workspaces connected to your user account/email address. You can read, view, upload and manage the files in the portal and workspaces. What you are permitted to do is depending on the permissions that you got.

NOTE: If you experience that you cannot see any content, try to drag downwards on the screen to reload the screen. The information must be synced before it will be displayed, this will force it to be synced faster.

Upload files
1. Click on the **+** button in middle at the bottom of the screen.
2. Click on the button **From Library**, to upload a file from your device.

3. Choose the location on your device from where you want to upload the file. **NOTE**: The way you navigate can differ depending on what brand and type of device you use.
4. Choose the file by clicking on it.
5. The app will tell you when the file is uploaded to the workspace. The message *Upload complete* will show on the screen.
6. You will now see the file in the document area.

If you regret your changes or you do not want to save the added/modified parameters, click on the **X** or **Cancel** button.

Create a new folder
1. Click on the **+** button in the left corner in the bottom of the screen.
2. Click on the button **New Folder**, to create a new folder.
3. Fill in the name of the new folder in the field *New folder name*.
4. Click on **OK** when you are done.
5. You will now see the new folder in the document area.

If you regret your changes or you do not want to save the added/modified parameters, click on the **X** or **Cancel** button.

Preview a file
1. Click on the file you want to preview.
2. Now a preview window will open so that you can see the content. **NOTE**: Depending on what brand and type of device you use, the behavior of the device can differ.
3. Use the arrow up in the left corner or the native built in navigation buttons on your device to get back to the document area.

Open a folder
1. Click on the folder you want to open.
2. Now you can see the content of the folder.
3. Use the up arrow above content or the native built in navigation buttons on your device to get back to the document area.
4. Use the arrow in the upper left corner if you want to get back to where you choose workspace.

Open a file
1. *On Android devices*: Click and hold for a while on the file you want to open. Then you will see the button **Open on device** up in the top of the screen. Click on that. *On iOS devices*: Swipe to the left on the file name and click on **More** to show the menu. Click on the button **Open on device**.
2. Now you can select what installed app you want to use to open the file. **NOTE**: Depending on what brand and type of device you use, the behavior of the device can differ. Often you also need to have some type of *Office* app to open documents. Download them at *Google Play* or *iTunes*.
3. Use the native built in navigation buttons on your device to get back to the *iCoordinator* app.

Get information about a file or a folder

1. *On Android devices*: Click and hold for a while on the file/folder you want to see information about. Then you will see the button **Information** up in the top of the screen. *On iOS devices*: Swipe to the left on the file name and click on **More** to show the menu.
2. Click on the button **Information**.
3. You can now see information about *Version*, *Created*, *Modified*, *Size*, *Stored*, *Permissions* and *Labels*.
4. When you are done, click on the arrow button up in the left corner to go back.

Move a file or a folder

1. *On Android devices*: Click and hold for a while on the file/folder you want to move. Click on the three dots up to the right. *On iOS devices*: Swipe to the left on the file name and click on **More** to show the menu.
2. Now you can select **Move** in the list of functions.
3. You can now navigate to the location where you want to paste your file or folder.
4. Click on the tick button down in the right bottom corner to paste the file or folder. **NOTE**: You can also create a new folder here by clicking the **+** button down in the left corner if you want to paste it there instead.
5. The message *File was updated* will show up on the screen and disappear by itself after a while.

If you regret your changes or you do not want to save the added/modified parameters, click on the **X** or **Cancel** button.

Copy a file or a folder

1. *On Android devices*: Click and hold for a while on the file/folder you want to copy. Click on the three dots up to the right. *On iOS devices*: Swipe to the left on the file name and click on **More** to show the menu.
2. Now you can select **Copy** in the list of functions.
3. You can now navigate to the location where you want to paste your copied file or folder.
4. Click on the tick button down in the right bottom corner to paste the file or folder. You can change the name in the window that shows up and confirm with *OK*. **NOTE**: You can also create a new folder here by clicking the **+** button down in the left corner if you want to paste it there instead.
5. The message *File was created* will show up on the screen and disappear by itself after a while.

If you regret your changes or you do not want to save the added/modified parameters, click on the **X** or **Cancel** button.

Rename a file or a folder

1. *On Android devices*: Click and hold for a while on the file/folder you want to rename. Click on the three dots up to the right. *On iOS devices*: Swipe to the left on the file name and click on **More** to show the menu.

2. Now you can select **Rename** in the list of functions.
3. In the pop-up window *Rename* you can change the name.
4. Click on **Rename** when you are done.
5. The message *File was updated* will show up on the screen and disappear by itself after a while.

Delete a file or a folder

1. *On Android devices*: Click and hold for a while on the file/folder you want to delete. Click on the three dots up to the right. *On iOS devices*: Swipe to the left on the file name and click on **Delete**. Confirm your choice by clicking the button *Delete*.
2. *On Android devices*: Now you can select **Delete** in the list of functions.
3. Confirm your choice by clicking the button *Delete*.
4. The message *File was deleted* will show up on the screen and disappear by itself after a while.

If you regret your changes or you do not want to save the added/modified parameters, click on the **Cancel** button. Go back by clicking the button **X** up in the right corner.

Smart Folders

If you click on **Smart Folders** you can see the Smart Folders that are created through the web version of the tool. If you then click on the desired Smart folder, you can see the files with the matching labels inside it.

About

Here you can see the name of the product, version number of the app and also see the links to the *End-User License Agreement*, *Product information* and *Support*.

Settings

Here is where you can set the limit for how much data storage the app may to use on your device, for locally downloaded content. This will affect how much data you can store locally offline on your device. **NOTE**: This setting is affected by the specifications of your device. No guarantee is given that the desired file storage limit can be reached.

Logout

If you click on **Logout** you will be logged out from the app and have to log in again to access the files.

Supported mobile platforms

The iCoordinator mobile app runs on Android version 5.0 or newer. iOS version requires iOS 8.0 or later. Compatible with iPhone, iPad, and iPod touch.