



## Administrator Training Modules

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Step 1	Name your workspace	
Step 1	Add/Remove Administrators	
Step 1	Add a logo to your workspace	
Step 2	Add a folder so users can upload	Use these steps to setup a user to upload a collection of documents. An investment banker may choose to have a client send all of their files this way.
Step 2	Create a user group	
Step 2	Setting user permissions by group	
Step 2	Add a user or users to the group	
Step 3	Populate the Overview tab	
Step 3	Add text content with details on the workspace	
Step 3	Upload a video to the Overview tab	
Step 3	Add hyperlinks to external websites such as news articles	
Step 4	Review of additional options under the settings tab including:	
Step 4	Notifications settings	
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Step 4	Hiding folder and file Indexing, and Version Badges	
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Step 7	Moving files and folder within Caplinked	
Step 7	Move full folder set of files sent from client to the parent folder view	
Step 7	Move groups of files to their proper folders	
Step 8	Upload folders and files to Caplinked as an Administrator	
Step 8	Upload files, folder by folder	
Step 8	Upload everything at one time, in bulk	
Step 9	Add metadata to folders and files	
Step 9	Allow users to see details on a folder's, or file's contents befor clicking into each item	
Step 10	Creating your groups and adding users	

Step 10	Set permissions. Allow viewing, uploading, or downloading rights
Step 10	Set Digital Rights Management (DRM) to protect downloaded documents
Step 11	Enable Digital Rights Management (DRM) - Protect downloaded documents Enable watermarking Set expiry date for workspace
Step 12	Adding "Users" (non-administrators) to your groups Send Invites to users Send manual invites or invite reminders to users
Step 13	Allow select documents to be downloaded and edited by non-administrators
Step 14	Sending emails and messages from within Caplinked Notify of new file uploads Send general communications or broadcast announcements to users
Step 15	Using Q&A functionality within Caplinked Add questions to the FAQ area Assign questions to specific administrators
Step 16	Activity tracking and reporting Activity overview Activity by Group Activity on the File level Activity by Member
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