papercurve

Admin Quick Start Guide

ver 1.01

Content Curation and Activity

Creating Libraries

- To create a library, click on your name on the top right corner and navigate to “Workspace”
- From here, click on “Libraries” from the Menu panel and select “create Library” on the top right
- To add user access to a new library go to “Workspace” > “Users” > Select user > select the Library that you want the user to have access to
- Libraries can be viewed through the “APPROVED” tab on the top bar

Tip: Don’t worry about creating too many Libraries to start. Libraries are designed to hold thousands of files and powerful tools like tags, search, sort and filter make it easy to find the content you need.

Click to learn more about Libraries ➜

Releasing and Revoking Content

- To review and manage content approvals on a file in draft, go to the file and click on “APPROVALS” at the top of the right side bar to navigate to the “Manage approvals” page
- Once all reviewers have approved, you will have the option to add more reviewers or release the content to your chosen library by clicking the Release content button
- You are able to revoke content from the same “Manage approval” page after it has been released by clicking the “Revoke content” button. To navigate to the approved content, go to “Approved” > Select Library

Click to learn more about Releasing and Revoking ➜

Downloading Content

- Click the three-dot icon ••• to the right of the document title and select “Download” to reveal the download options
- If your original source file was part of the Microsoft suite, you will be able to download the original file type without comments and references in the first option
- If your original source file was outside Microsoft Suite, you will see two options - download with comments & references or download without comments & references in a PDF format

Click to learn more about Downloading Content ➜

Activity Log

- To access the activity log for your workspace click on your name on the top right and navigate into “Workspace” and then select the “Activity Log” heading on the left hand panel
- After putting in a date range for your log , select “Generate Log” to get a CSV of all actions performed within your workspace within that time period

Click to learn more about Activity Logs➜

Managing Users

User Roles and Permissions

- To access User Roles and their settings, click on your name on the top right and navigate into "Workspace" and then select the "Users" heading on the left hand panel
- There are three type of User Roles: Viewer, Author and Admin
  - Viewer: Can only add comments, references and give approvals
  - Author: Can upload files and add/remove reviewers in addition to making comments, references and approving content
  - Admin: Can do everything an author can as well as create libraries, add/edit User Roles, deactivate users, change library access for Users and access Activity Logs

Click to learn more about User Roles ➜

Adding and Deactivating Users

- To add a user, click on your name on the top right and navigate into "Workspace" and then select the "Users" heading on the left hand panel. You can toggle the welcome email on/off and select their access level from the right hand panel
- If a user is inactive, you can deactivate them by selecting the user > "Deactivate User ". This does not permanently delete them. Deactivated users are shown and can be reactivated as needed by clicking "Reactivate" at the bottom of their profile

Tip: To increase engagement, make sure new users have content to review when they log in.

Click to learn more about User Management ➜

Need help with something else?

Click the Support Chat Icon, visit help.papercurve.com
or contact support@papercurve.com.

papercurve

50 Carroll Street
Toronto, Ontario, Canada
M4M 3G3