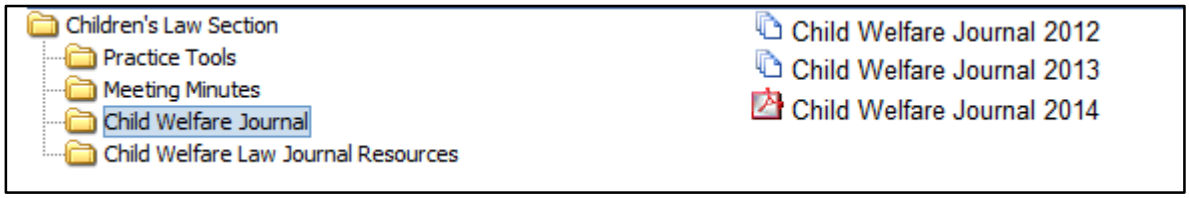
SBM Connect
STATE BAR OF MICHIGAN

How to Use a Committee's Library

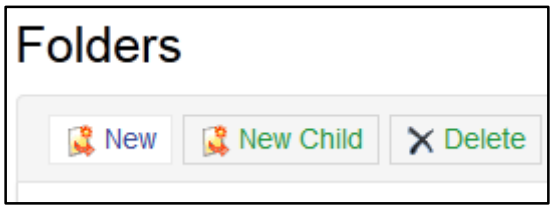
Every committee has its own library, which can be used to share and archive documents. Libraries can house a variety of documents, including PDFs, Word, video, or audio files; in addition, an individual library entry can house documents of different file types—such as a video file and its corresponding PDF. This tutorial will teach you how to access the library and upload and organize your files into manageable categories. Note: some functions may be designated for only Administrators.

1. When viewing your committee page, click on the **"Library"** tab.

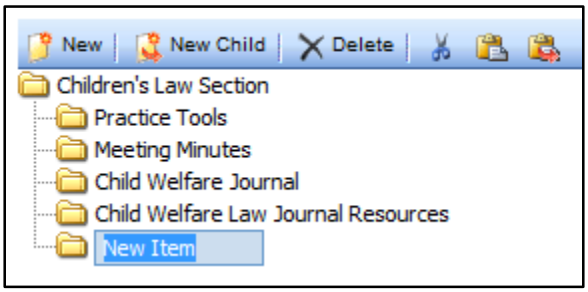
2. This will take you to the Library view where you'll be able to see a parent folder for the committee and any child folders (i.e. folders indented next to the main committee folder) indicating other library entries.
    a. Highlighting a particular folder will display the contents within that folder on the right side of the page. For example, the image below features the Child Welfare Journal, and shows 3 entries for 2012, 2013, and 2014. The entry for 2014 is in a different format and has a slightly different icon.
    b. To view files, say the 2012 Journals, simply double click that file name.



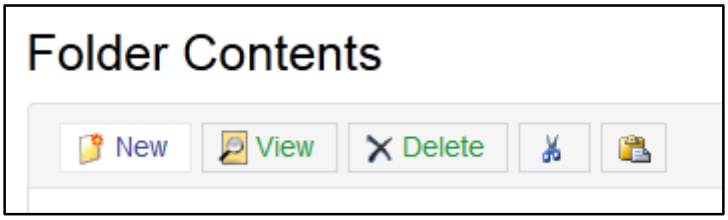
3. Administrators Only: To create a new folder, highlight the parent folder, usually the committee name, and click the "New" button under the left-hand heading "Folders."



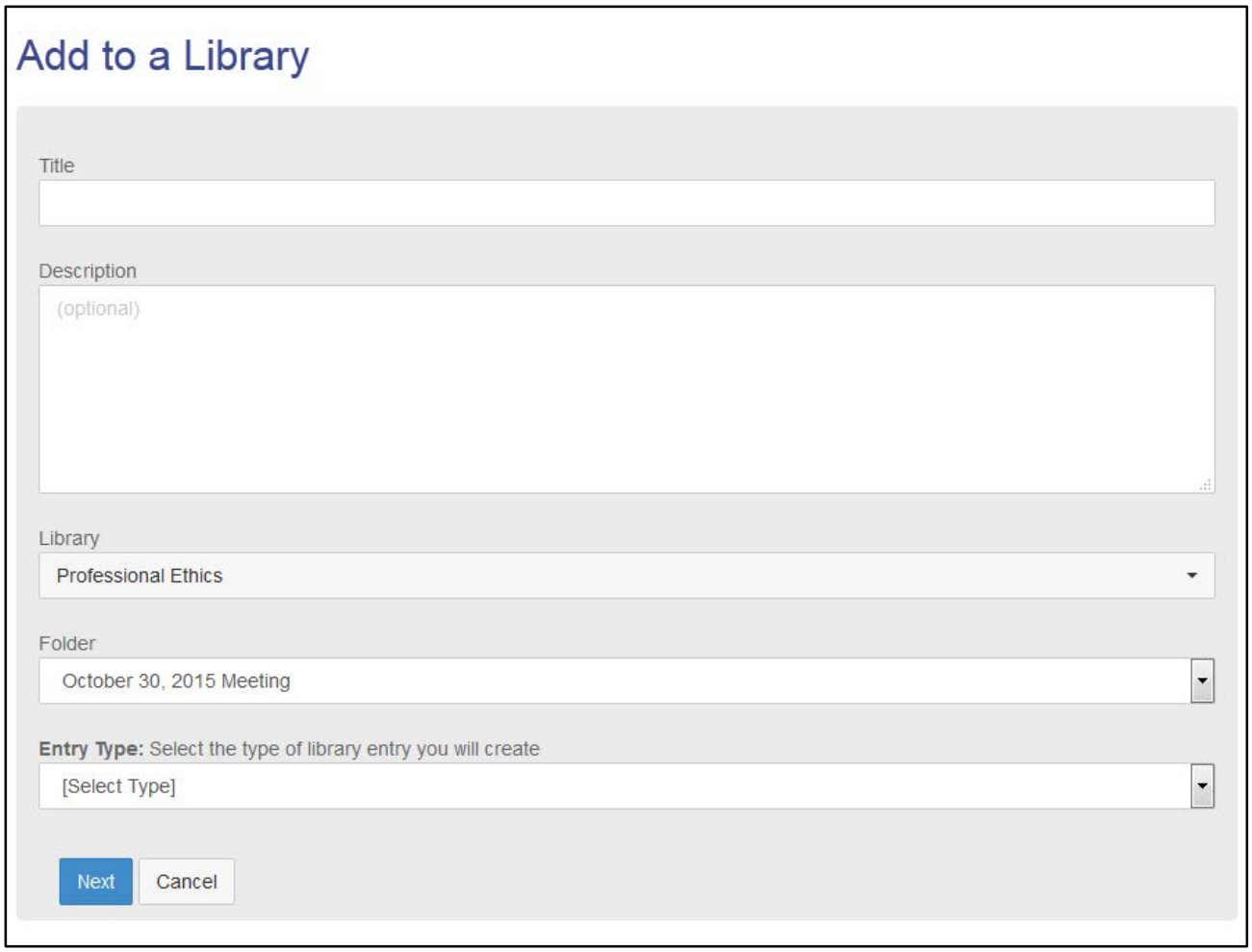
a. This will create a folder called **"New Item,"** which you will be able to rename to any title you wish.



4. All Committee Members: To add content, highlight the folder and click the **"New"** button under the right-hand column labeled **"Folder Contents."**

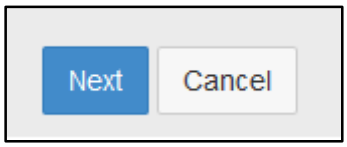


5. This will take you to the **"Library Entry"** menu, where you'll be asked to fill in a number of fields pertaining to your entry. The fields with an asterisk at the end of them are **required** fields.

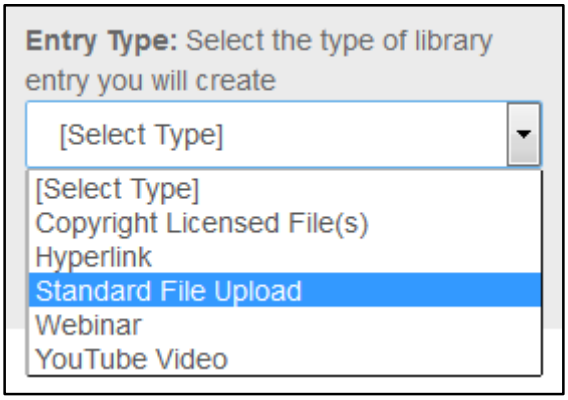


a. **Title** can be broad or specific, but generally serves as a hierarchical child entry to its corresponding parent folder (e.g. If the folder you selected previously was called "2014," you might create a title called "Annual Event Meeting Materials" or "Teleconferences")
b. **Description** allows you to say a few paragraphs about the library entry: what it contains, who created/hosted the materials, or even a preview of the content contained within.
c. **Library** will, by default, put your entry in the committee you're currently logged into; however, you may publish it in a different committee, if it pertains to different members.
d. **Folder** will repeat the name of the folder you originally highlighted after clicking "Library Entry." You may pick another folder at this point if you would like it published somewhere else.
e. **Entry Type** will ask you what *exactly* you'll be putting into the entry, such as: copyright files, a web hyperlink, multiple standard files—such as Word Docs and PDFs, a video/audio Webinar, or a YouTube video.

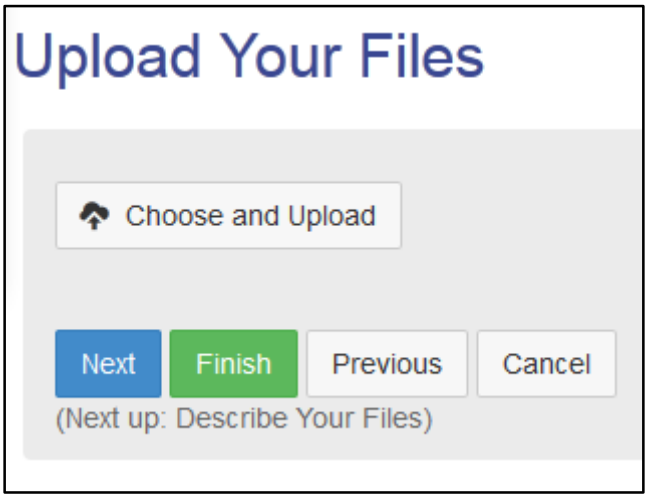
6. Once all of the required fields have been entered, click the **"Next"** button in the bottom right-hand corner to continue.



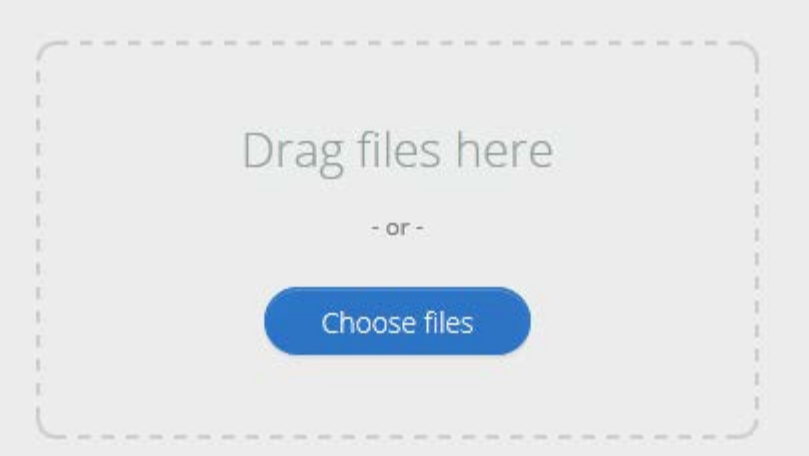
7. One of the most popular **"Entry Types"** is the **"Standard File Upload"** option. We'll be continuing this tutorial based on this method of uploading content, but the processes involved for other upload methods, such as uploading a Webinar or YouTube video, are similar.



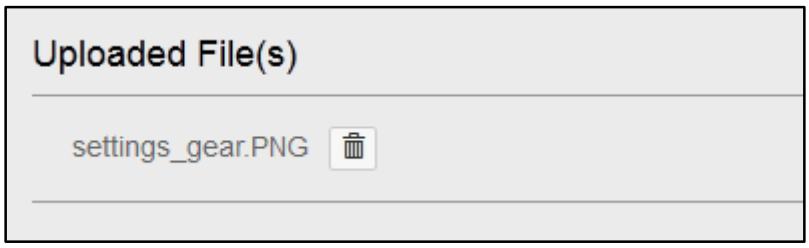
8. This will take you to the **"Upload Manager"** where you can choose how many files you would like to upload. Click **"Choose and Upload"** to browse through your computer's file system and search for the file(s).



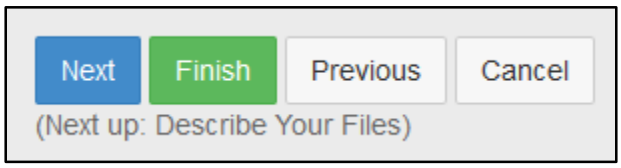
   a. Once you've found and chosen your desired number of files, click the **"Choose files"** button to upload it to the SBM server.



b. You will see your uploaded files under the heading **“Uploaded File(s).”** You will not be able to continue to the next menu without uploading at least one file.

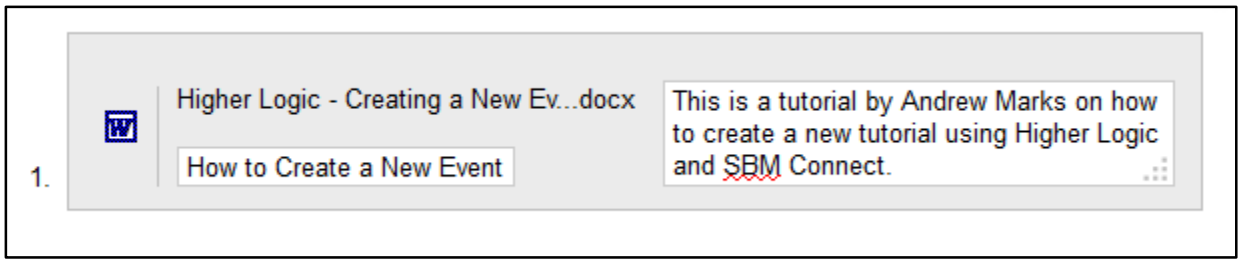


9. Clicking **“Next”** will take you to a menu allowing you to give each file a formal name and brief description; however, if you are satisfied with each uploaded file and would like to publish your library entry as-is, click **“Finish.”**

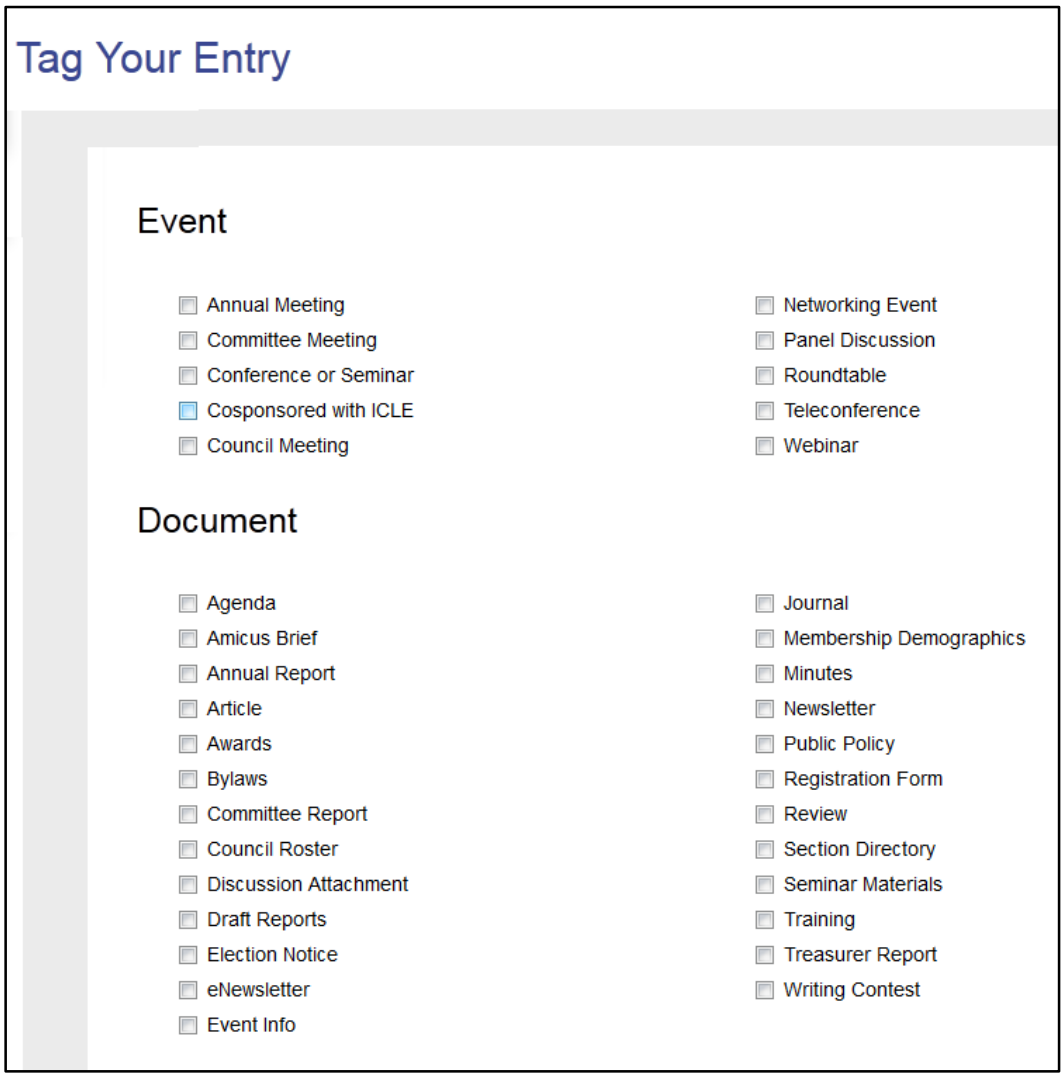


a. Just like the text below, the next menu will allow you to **“Describe Your Files.”**

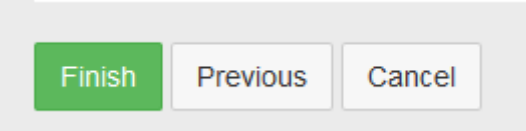
10. Clicking **“Next”** will take you to a menu allowing you to give each file a name like "May Minutes," "View the Seminar Materials," etc.; add a short description in the box on the right. You can also drag the boxes to reorder them.



11. Clicking **"Next"** will take you to **"Tag Your Entry, "**which will allow you to pick keywords that best fit your entry and allow for easy grouping and searching in the future (e.g. search all "Agendas" or search all "Minutes"). We recommend selecting one or two Document tags.

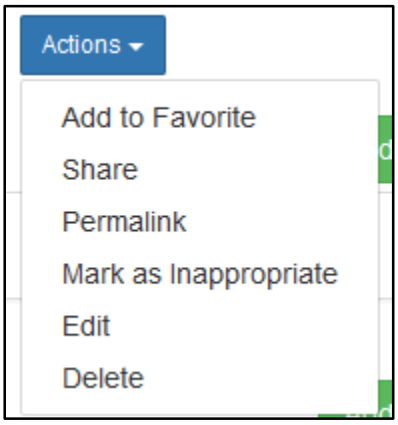


12. This is the final menu available for adding a library entry. When you are done, click **"Finish."**

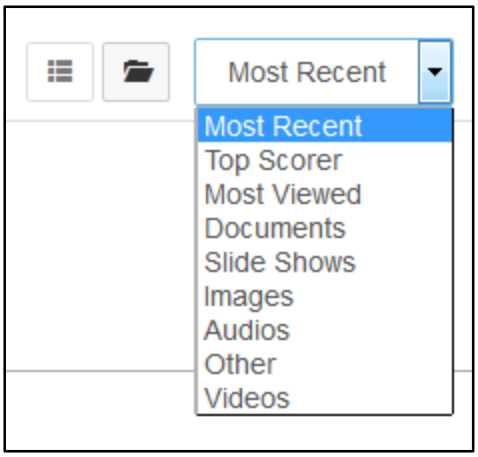


13. Clicking on “Finish” publishes your library entry and allows you to see all of the options you’ve selected from past menus. If you’d like to change any of those options after publication, you may do so by clicking **“Edit”** under the right-hand **“Actions”** button.

    a. You may also **“Delete”** your event under this heading by clicking on the button directly under “Edit.”



14. The Library view actually has two views, **Folder View** and **List View.** We saw the folder view at the beginning of this tutorial when we were highlighting folders and making new entries to put into those folders, but you might also return to List View, which does not feature any folders; instead, List View lists every library entry which can then be sorted in a number of ways.



    a. In both views, you can sort entries by: Most Recent, Top Scorer, Most Viewed Documents, and more.