



THE ARCHIVE WAREHOUSE

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The Archive Warehouse

Comprehensive User Manual

Welcome to The Archive Warehouse Workspace Portal. This user manual provides step-by-step instructions with visual references to help you navigate and utilize both the Client Administration Portal and the Department User Portal.



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1. Landing Page & System Authentication

1.1 Landing Page

The Archive Warehouse landing page provides entry to the secure cloud platform and highlights core services including Physical & Digital Archiving, Secure Cloud Access, and Audit Compliance.



Figure 1.1a — The Archive Warehouse landing page (hero banner).

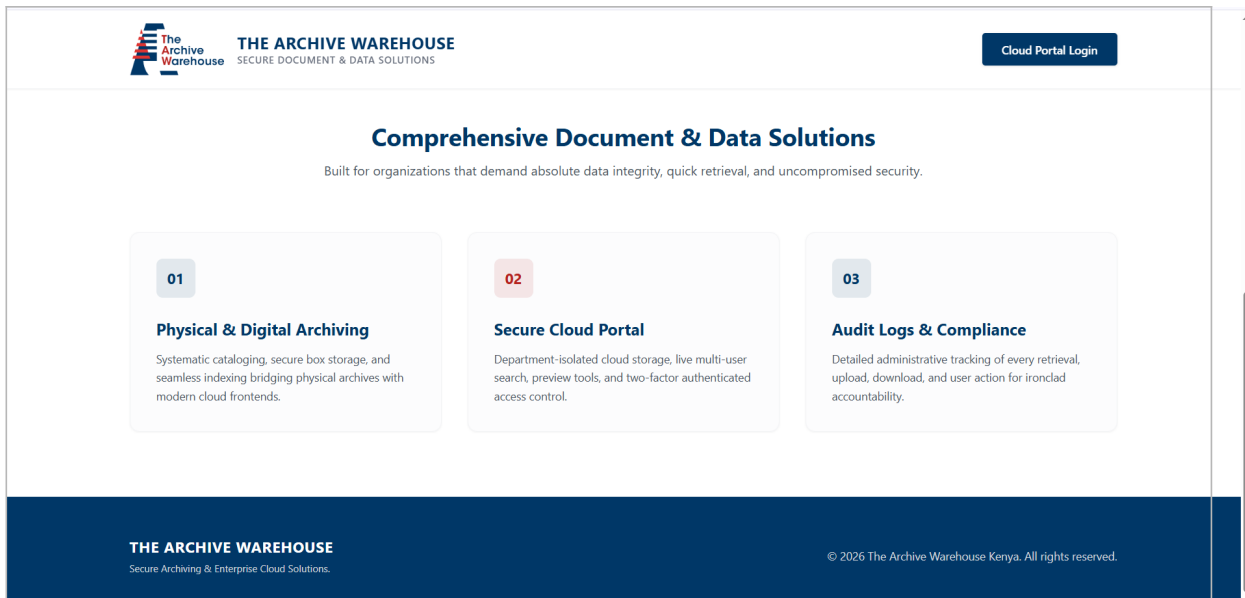


Figure 1.1b — Landing page: Comprehensive Document & Data Solutions section, listing Physical & Digital Archiving, Secure Cloud Portal, and Audit Logs & Compliance.

To Log In: Click either the Cloud Portal Login button in the top right header or the Access Cloud Portal button on the hero banner.

1.2 Authentication Page

- **Work Email:** Enter your company-issued email address (e.g., user@company.com).
- **Password:** Enter your secure account password.
- **Sign In:** Click **Sign In to Workspace** to proceed to your role-specific portal.

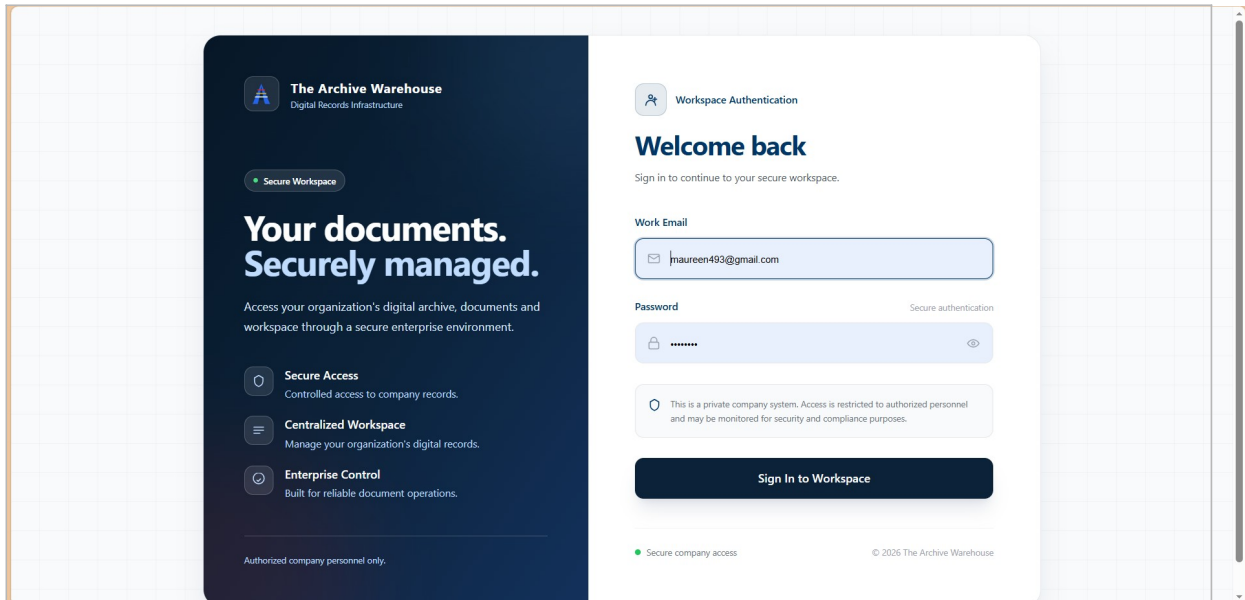


Figure 1.2 — Workspace Authentication (login) page.

1.3 Two-Factor Verification (OTP)

For accounts with two-factor authentication enabled, a Security Verification screen appears immediately after Sign In to confirm your identity with a one-time code.

- **Check your email:** a 6-digit one-time code is sent to your registered work email address as soon as you sign in.
- **Enter the code:** type the 6-digit code into the verification field.
- **Confirm:** click **Verify Code** (highlighted below) to complete sign-in and continue to your dashboard.

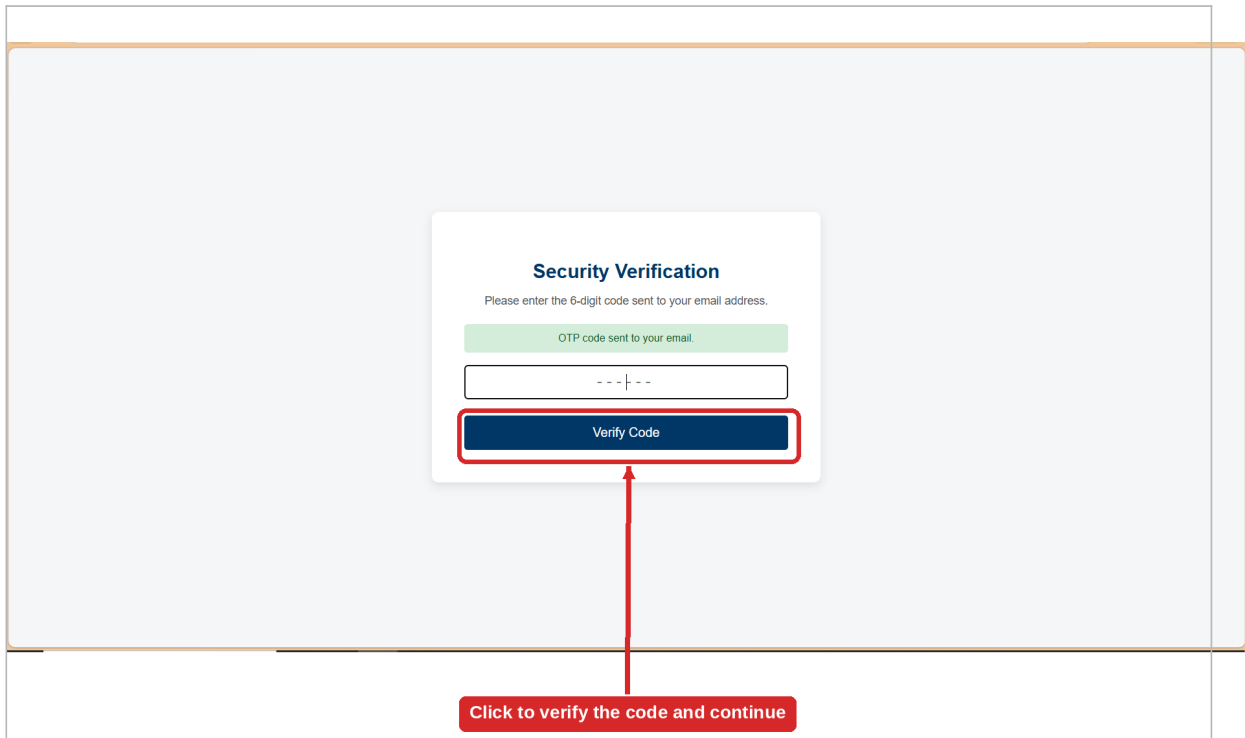
The image shows a 'Security Verification' form centered on a light gray background. The form has a white header with the title 'Security Verification' and a sub-header 'Please enter the 6-digit code sent to your email address.' Below this is a green box containing the text 'OTP code sent to your email.' Underneath is a white input field with a placeholder '---|---'. At the bottom of the form is a dark blue button with the text 'Verify Code', which is highlighted with a red rectangular outline. A red arrow points from a red button at the bottom of the page, labeled 'Click to verify the code and continue', up to the 'Verify Code' button on the form.

Figure 1.3 — Security Verification (OTP). The red-outlined Verify Code button confirms the one-time code and completes sign-in.

Note: Never share this code with anyone — The Archive Warehouse staff will never ask for it. The code is single-use and tied to this sign-in attempt only.

2. Client Administration Portal (Dark Theme)

The Client Administration interface uses a dark-themed portal dedicated to organizational administration, user onboarding, audit tracking, and storage management.

2.1 Admin Dashboard Overview

Upon logging in as an administrator, the overview dashboard displays real-time organizational metrics:

Top Status Cards:

- **Departments:** Total active operational units across the organization.
- **Team Users:** Total registered company staff members.
- **Total Documents:** Total count of stored files in the cloud archive.
- **Quick Navigation Shortcuts:** Fast access to Manage Users, Audit Logs, Reports, and Settings.

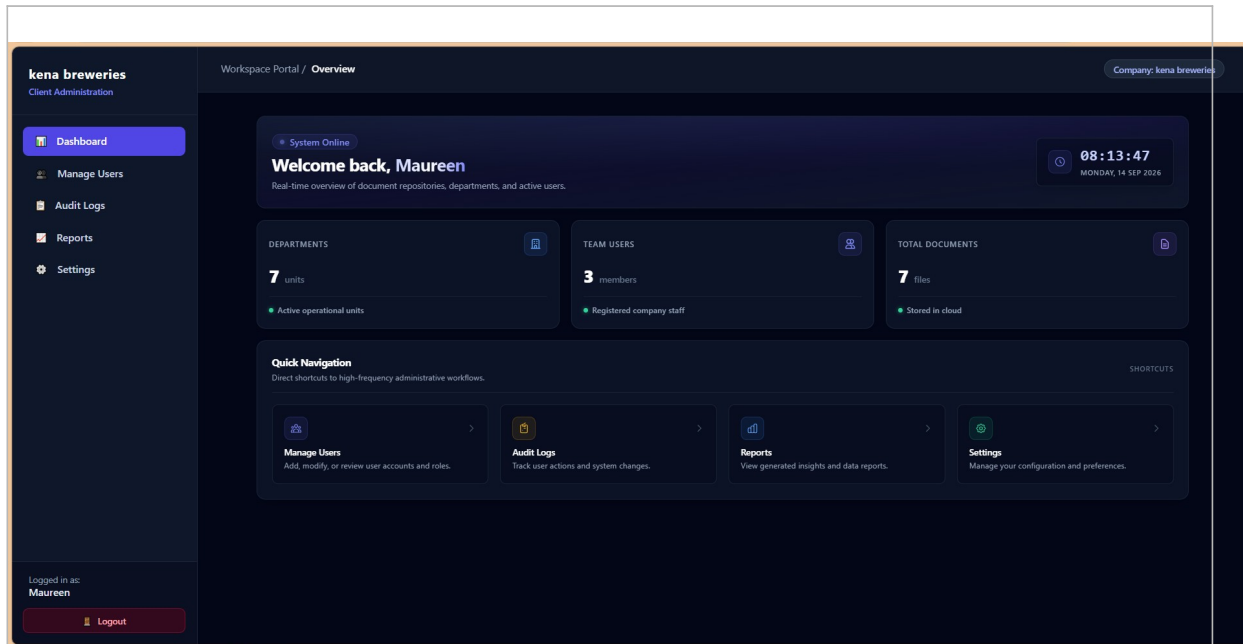


Figure 2.1 — Admin Dashboard Overview, showing Departments, Team Users, and Total Documents status cards plus Quick Navigation shortcuts.

2.2 User Administration & Onboarding

Navigate to Manage Users from the left navigation sidebar.

Steps to Onboard a New User:

Under Onboard User (left pane):

- **Full Name:** Enter the complete name (e.g., Jane Doe).
- **Username:** Enter an assigned username (e.g., jdoe).
- **Email Address:** Enter the staff email.
- **Password:** Set an initial password.
- **Department:** Select the target department (e.g., HR, ICT).
- **Role Type:** Choose the permission tier (e.g., Head of Department, Assistant, client_admin).

Click **+ Create Account** to finish onboarding the user.

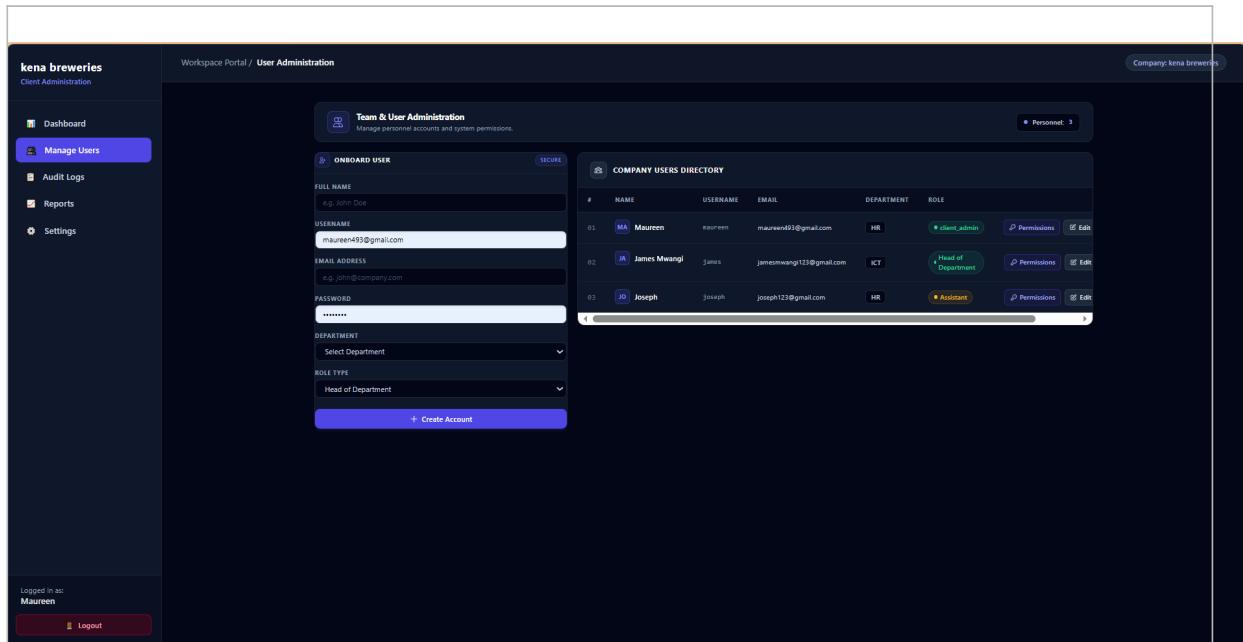


Figure 2.2a — Manage Users: Onboard User form (left pane).

Directory Management:

- **Company Users Directory (Right Pane):** Lists all active staff with their Name, Username, Email, Department, and assigned Role.
- **Permissions:** Click to customize individual module access.
- **Edit / Delete:** Modify existing account details or revoke system access.

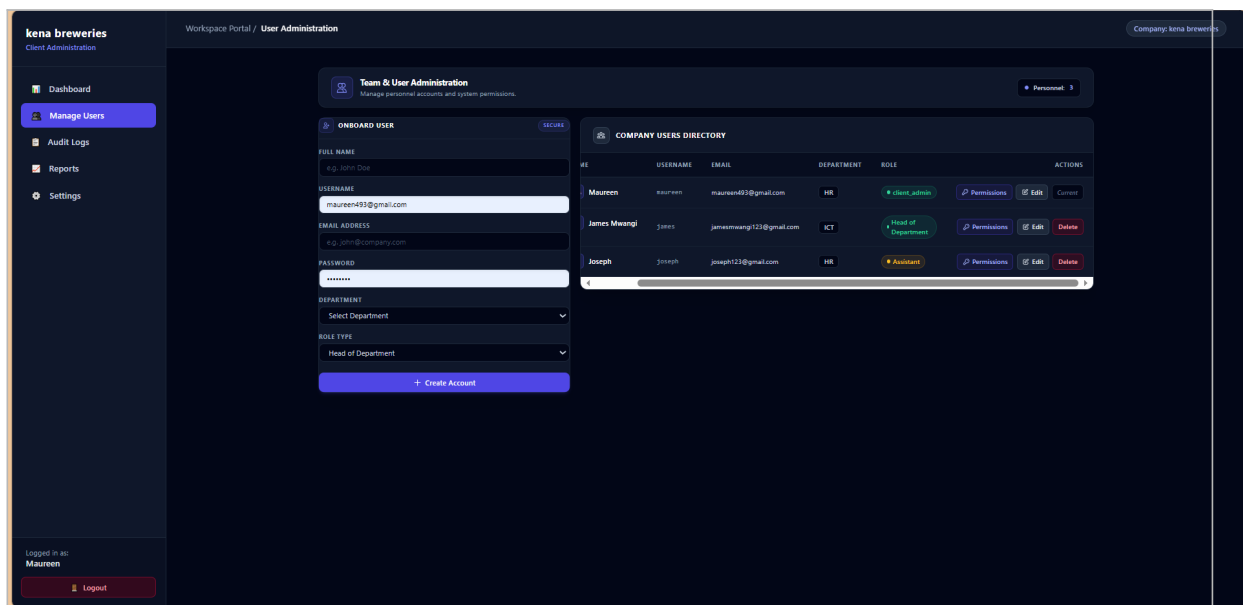


Figure 2.2b — Manage Users: Company Users Directory (right pane), with Permissions, Edit, and Delete actions.

Note: Double-check the **Role Type** before creating an account — it controls exactly which modules that user can see and edit once they log in, and is harder to widen later than to set correctly up front.

2.3 Company Audit Logs

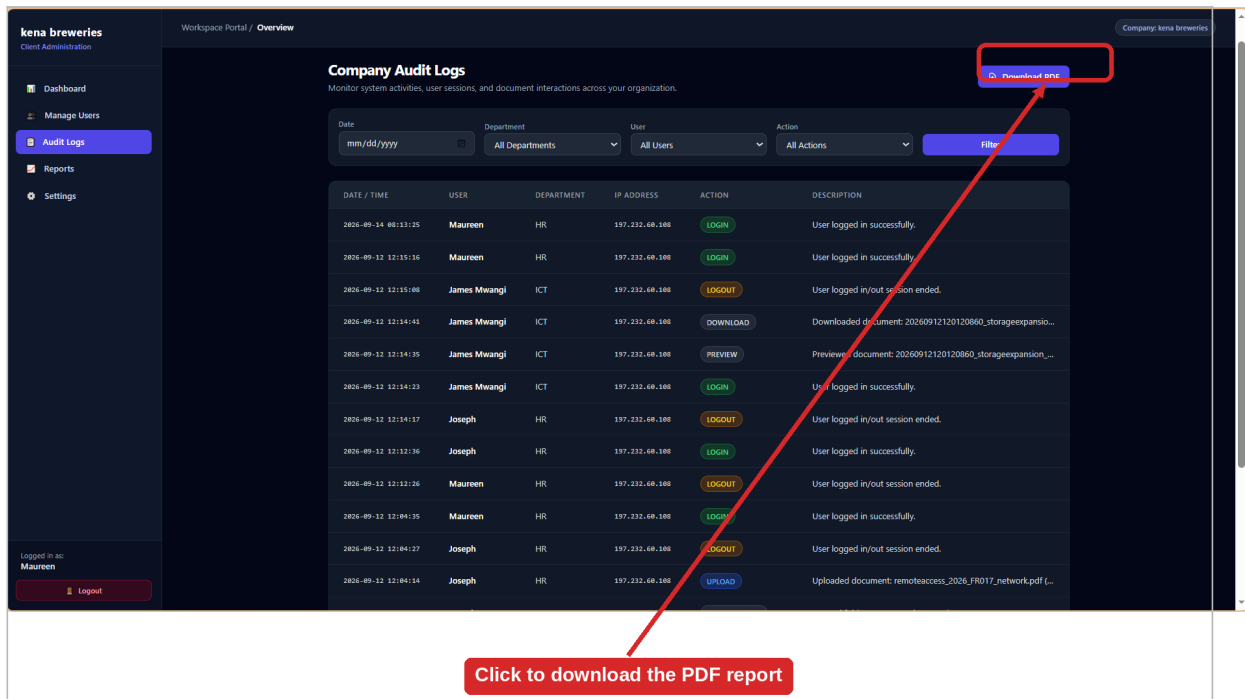
Navigate to Audit Logs to monitor real-time user activities and compliance records across the organization.

Filtering Activity: Use the top filter bar to narrow results by:

- **Date:** Filter events by a specific calendar date.
- **Department:** Filter by specific operational units.
- **User:** View log entries for a single employee.
- **Action:** Filter by activity type (LOGIN, LOGOUT, UPLOAD, DOWNLOAD, PREVIEW).

Set any combination of the above, then click the **Filter** button to apply them to the log table below.

Exporting Logs: Click the **Download PDF** button at the top right (highlighted below) to export the currently filtered audit results as a compliance-ready PDF report.



Click to download the PDF report

Figure 2.3 — Company Audit Logs. The red-outlined Download PDF button (top right) exports the current filtered view.

Note: The export always reflects your **current filters** — set Date, Department, User, and/or Action first, then click **Download PDF** so the report only contains the records you actually need.

2.4 Storage & System Reports

Navigate to Reports to monitor cloud resource allocation and storage consumption across departments.

- **General Storage Ring:** Displays overall used space against the 100 GB organization quota.

Department-Wise S3 Storage Breakdown:

- Displays Department Name, Files Count, Storage Size, and Share of Total (%) bar indicators.

Export PDF: Click the **Download Report**

PDF button (highlighted below) to generate an executive report summary of storage and document metrics.

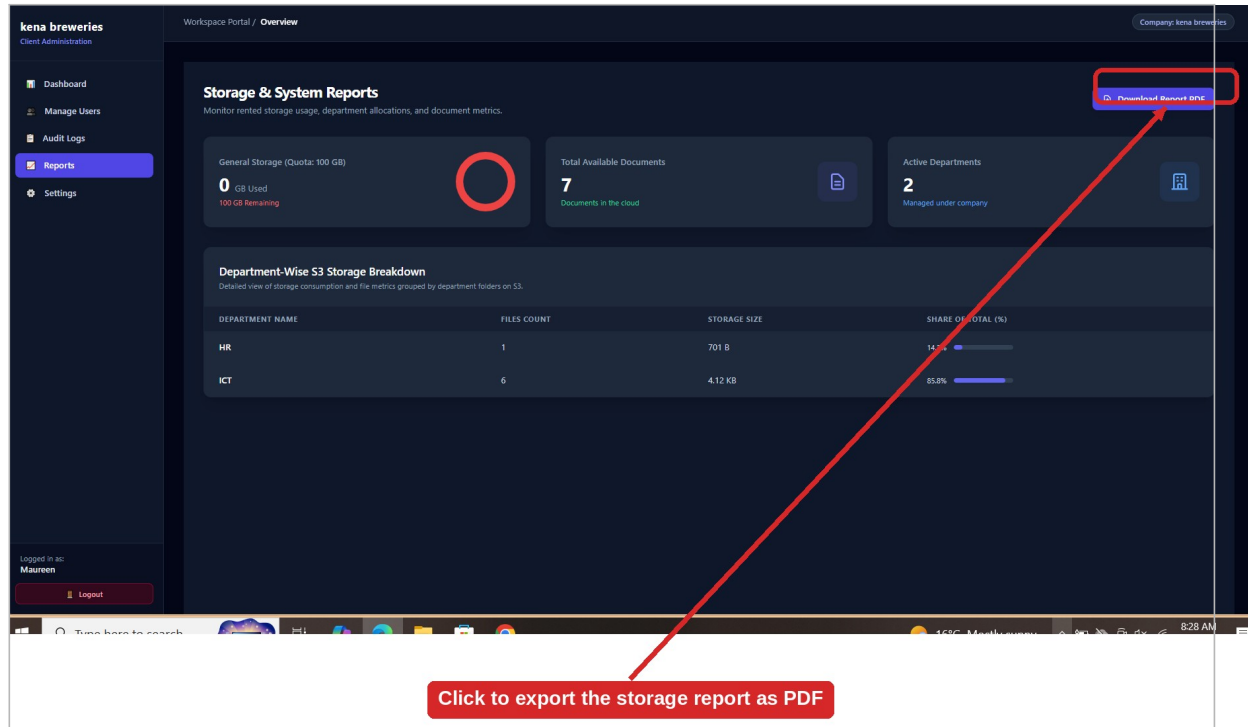


Figure 2.4 — Storage & System Reports. The red-outlined Download Report PDF button (top right) generates the executive summary.

Note: Use this report before board or client review meetings — it summarizes **quota usage, document counts, and per-department storage share** in a single downloadable PDF, so you don't need to screenshot the dashboard.

2.5 Admin Account Settings

Navigate to Settings to update administrator credentials and security preferences.

- **Profile Information:** View and update your Full Name (Email address is managed by system administrators).

Update Password:

- Enter your Current Password.
- Enter and confirm your New Password.

Click **Save Changes** to apply your updates.

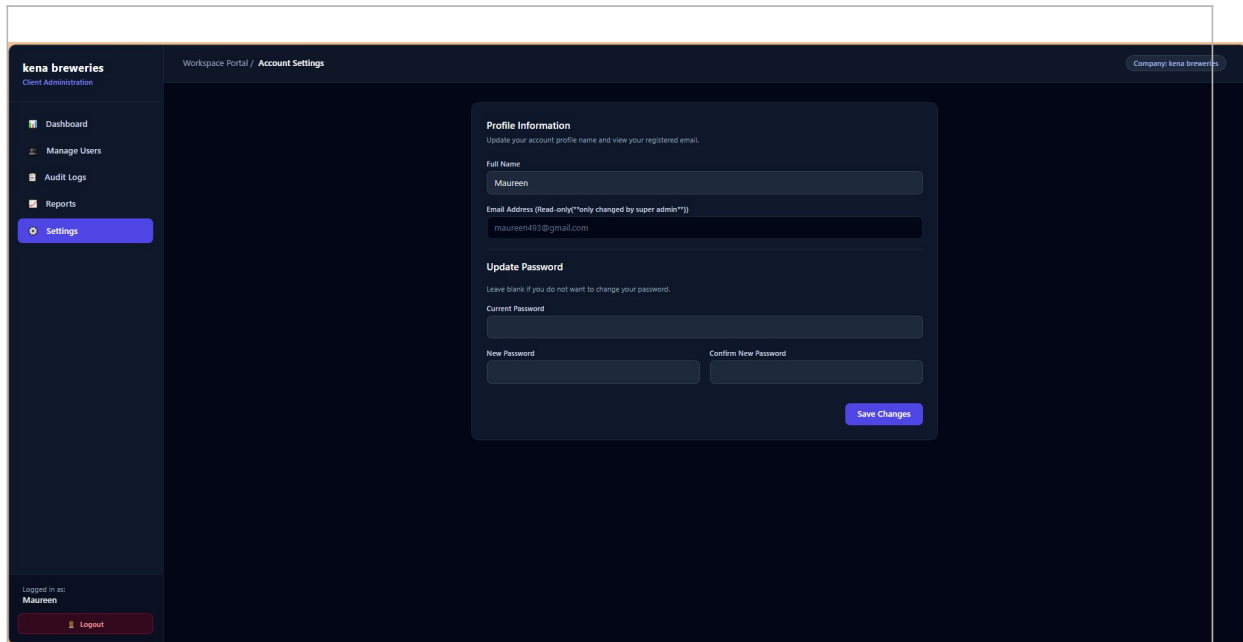


Figure 2.5 — Admin Account Settings: Profile Information and Update Password.

3. Department User Portal (Light Theme)

The Department Portal features a clean, light-themed interface designed for daily document operations, file uploading, and departmental cataloging.

3.1 Staff Dashboard Overview

The main staff dashboard provides immediate insights and quick actions for managing department records:

- **Header Banner:** Displays current Date, Time, Department name (e.g., ICT), and user role.
- **Summary Counters:** Shows Total Documents, Folders / Directories, and consumed Storage Used (e.g., 4.12 KB).
- **Quick Upload Widget:** Upload single files (up to 10MB) directly from the dashboard by choosing a file, then filling in the description and document year, then clicking the red **Upload Document** button (highlighted below).
- **Department Directories:** Quick links to explore top-level folder structures (e.g., audit).

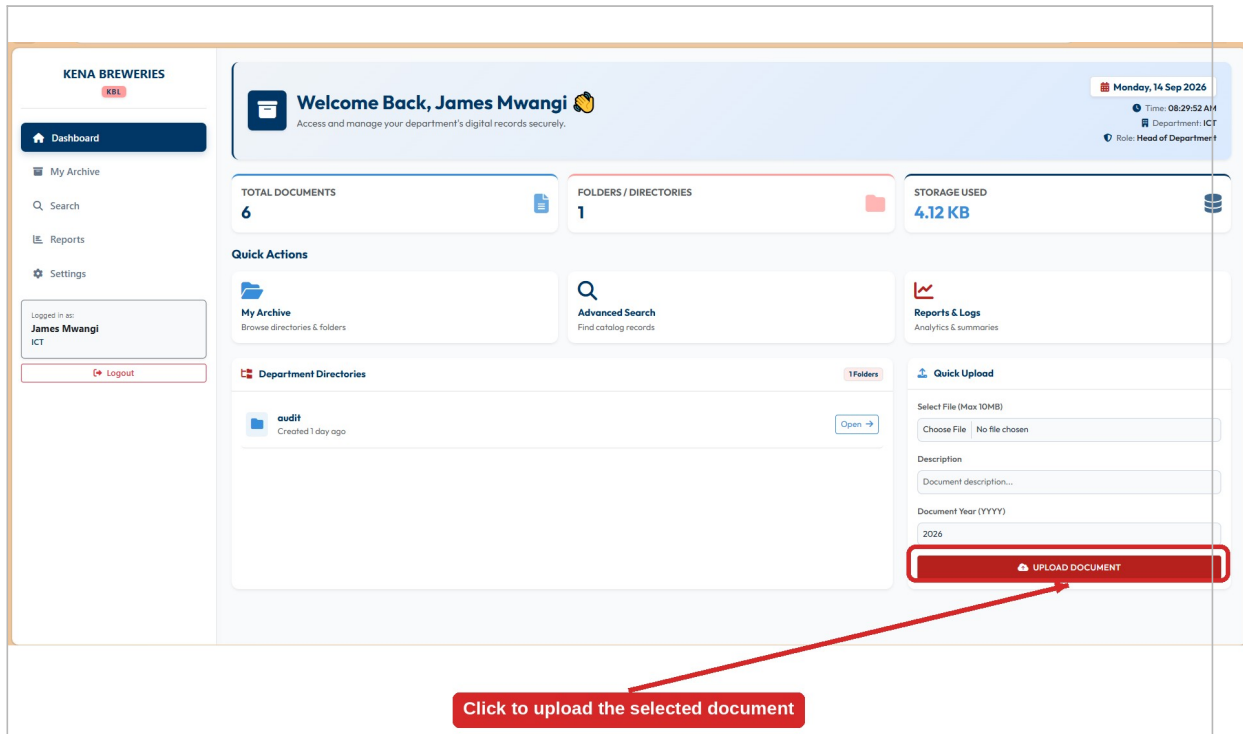


Figure 3.1 — Staff Dashboard Overview. The red-outlined Upload Document button submits the Quick Upload form.

Note: The **Upload Document** button stays inactive-looking until a file is actually selected via **Choose File** — always confirm the filename appears next to it before clicking upload.

3.2 My Archive (File & Directory Management)

Navigate to My Archive to access full file cataloging and folder management functions.

Creating a New Directory:

- Type the directory name in the New folder name... text field.
- Click the **+ Create** button (highlighted below) to add the folder.

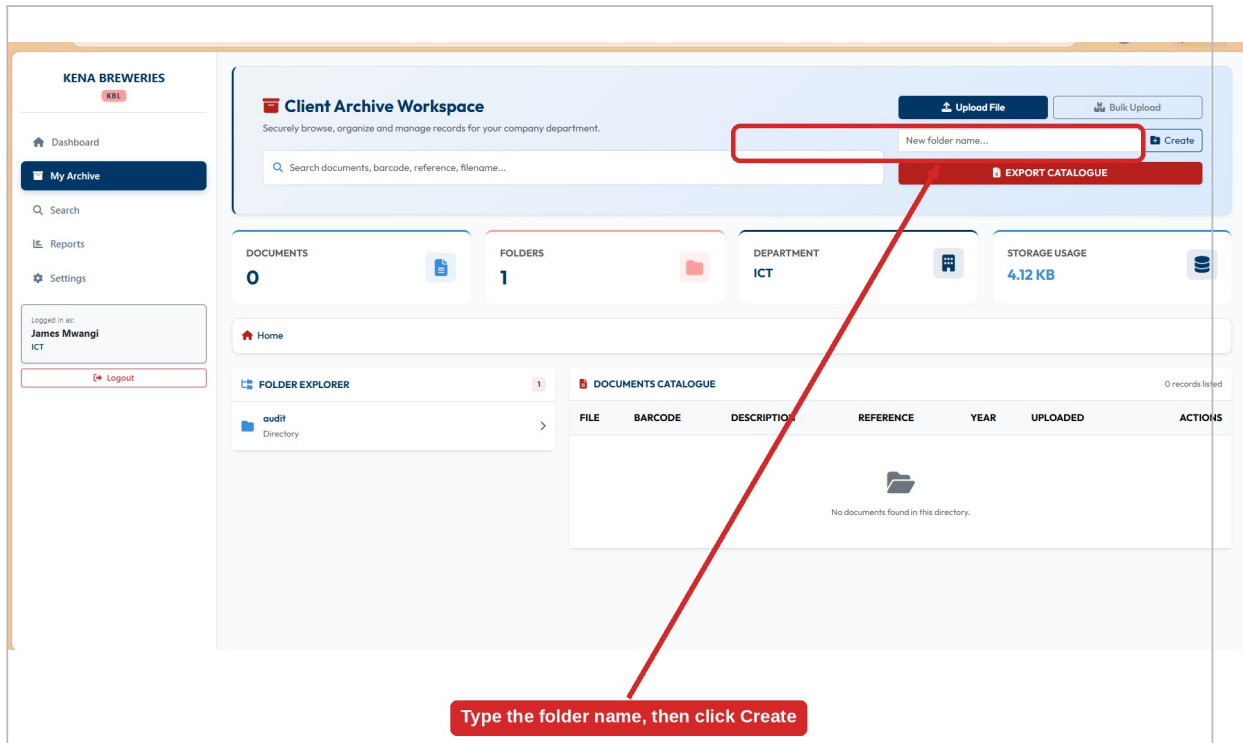


Figure 3.2a — Creating a new directory: type a name, then click the red-outlined Create button.

Uploading Files:

- Click **Upload File** (left button, highlighted below) for single document registration.
- Click **Bulk Upload** (right button, highlighted below) for multi-file batch uploads.

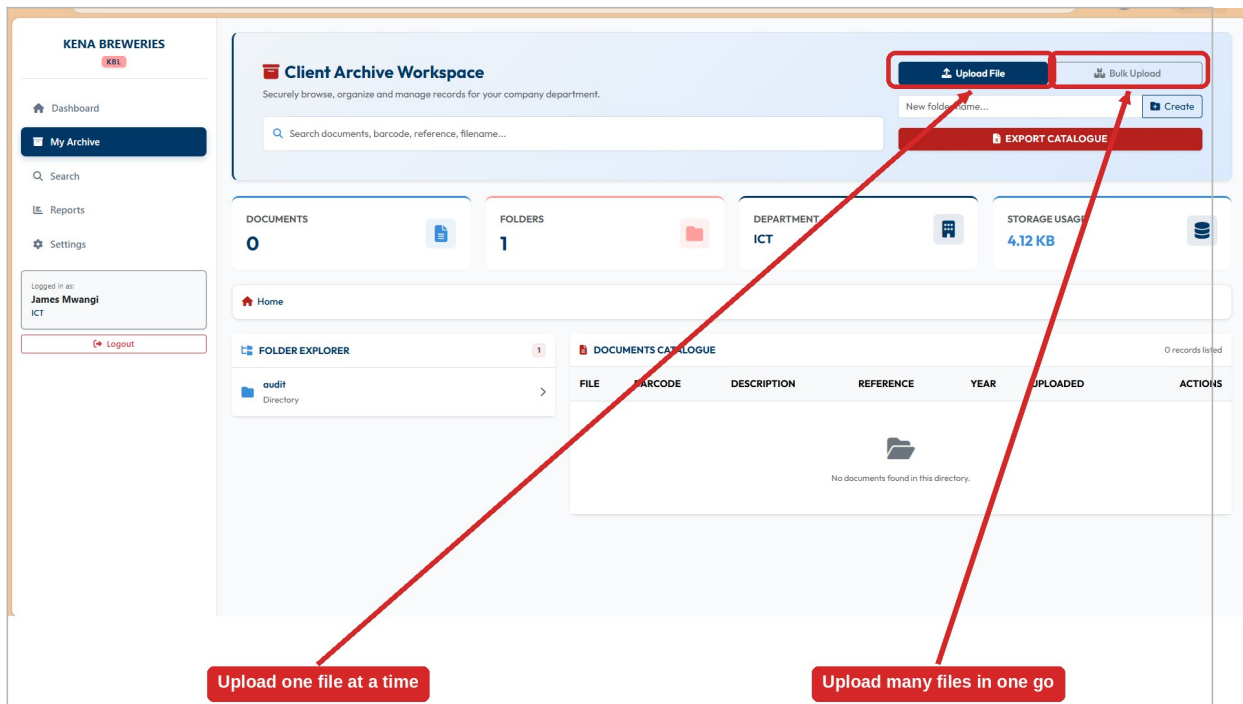


Figure 3.2b — Uploading files: Upload File (single document) and Bulk Upload (multi-file) buttons, outlined in red.

Note: Use **Upload File** for one-off documents that need their own description and reference details. Use **Bulk Upload** when registering many files from the same batch at once — it saves you from repeating the same steps file by file.

File Naming Convention:

When uploading a document, name the file using the following format:

Description_Year_File Reference_Field One

- **Description:** a short description of what the document is.
- **Year:** the document year, in YYYY format.
- **File Reference:** the reference code for the document.
- **Field One (optional):** an extra identifier, included only when needed to further distinguish the file.

Note: Keep the underscores between each part so the catalogue can read the filename correctly — only Field One may be left out.

Folder Explorer & Document Catalogue:

- Left pane lists directory structures.
- Right pane presents the file registry including File Name, Barcode ID, Description, Reference Code, Year, Uploaded Date, and available Actions (Preview/Download).

Exporting Index: Click **Export Catalogue** (highlighted below) to download a complete document inventory list for the current folder.

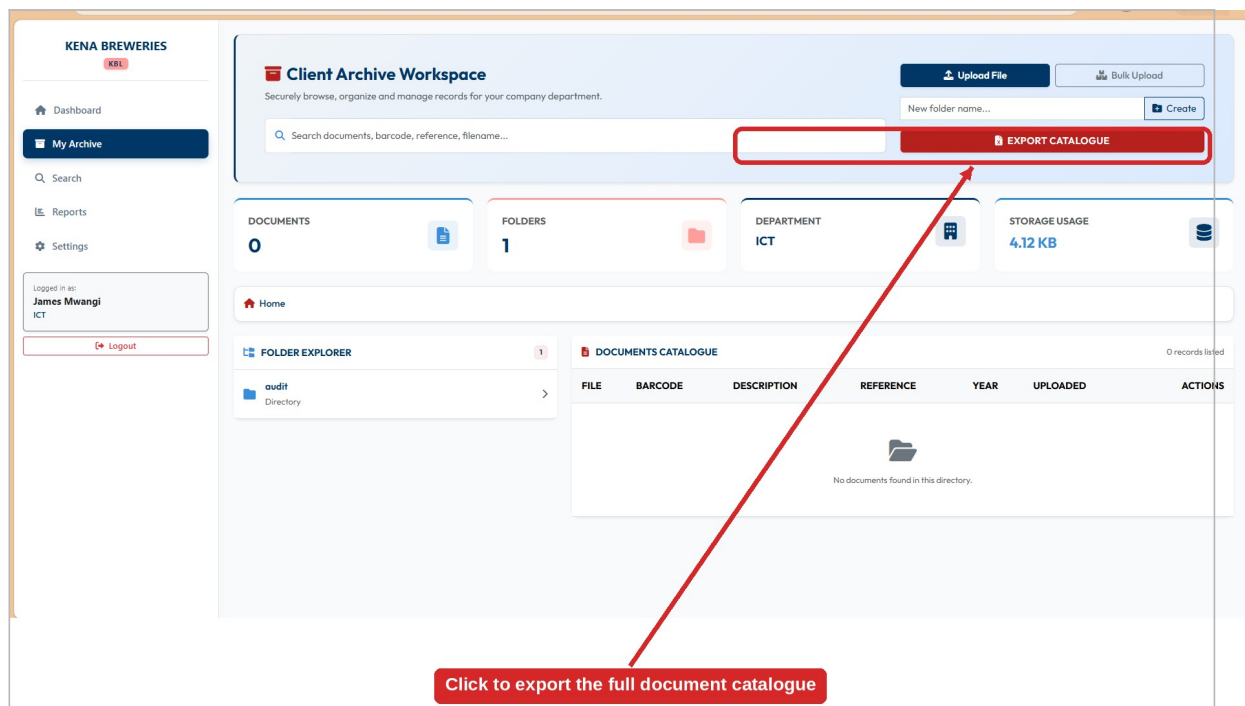


Figure 3.2c — Exporting the index: the red-outlined Export Catalogue button downloads the full document inventory.

Note: Export Catalogue exports whatever is currently listed in the Documents Catalogue pane — open the folder you want first, or use Search/filters, before exporting.

Locking a Folder with a PIN:

- Tick the **Lock folder with PIN** checkbox at the top of the workspace, then enter a 4–6 digit PIN (highlighted below) to restrict access to a sensitive folder.
- A **locked folder shows a gold padlock icon** next to it in the Folder Explorer, marked as a Locked Directory (also highlighted below).

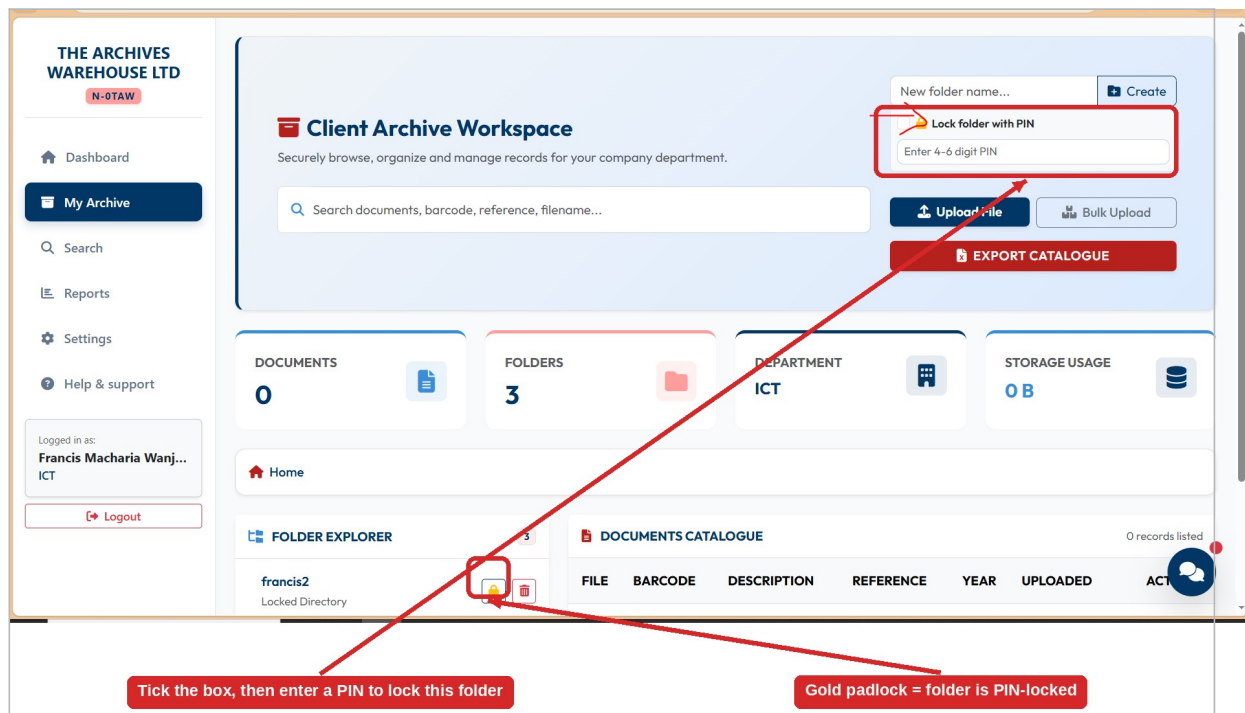


Figure 3.2d — Locking a folder with a PIN: the Lock folder with PIN control (top) and the resulting gold padlock badge on a locked directory (bottom).

Note: Keep the PIN somewhere your team can retrieve it — anyone who opens a locked folder, including you, will need to re-enter the correct PIN, and there is no folder-level “forgot PIN” recovery shown here.

3.3 Enterprise Archive Search

Navigate to Search to search for physical and digital archives.

Search Query: Type file names, barcode strings, reference numbers, or description keywords into the main search box and click Search.

Filters Pane:

- **Year Filter:** Narrow results by creation/archival year.
- **Month Filter:** Filter by specific month.
- **Sort By:** Sort results by Newest, Oldest, or Alphabetical.

Click **Apply Filters** to update results, or **Clear Filters** to start over.

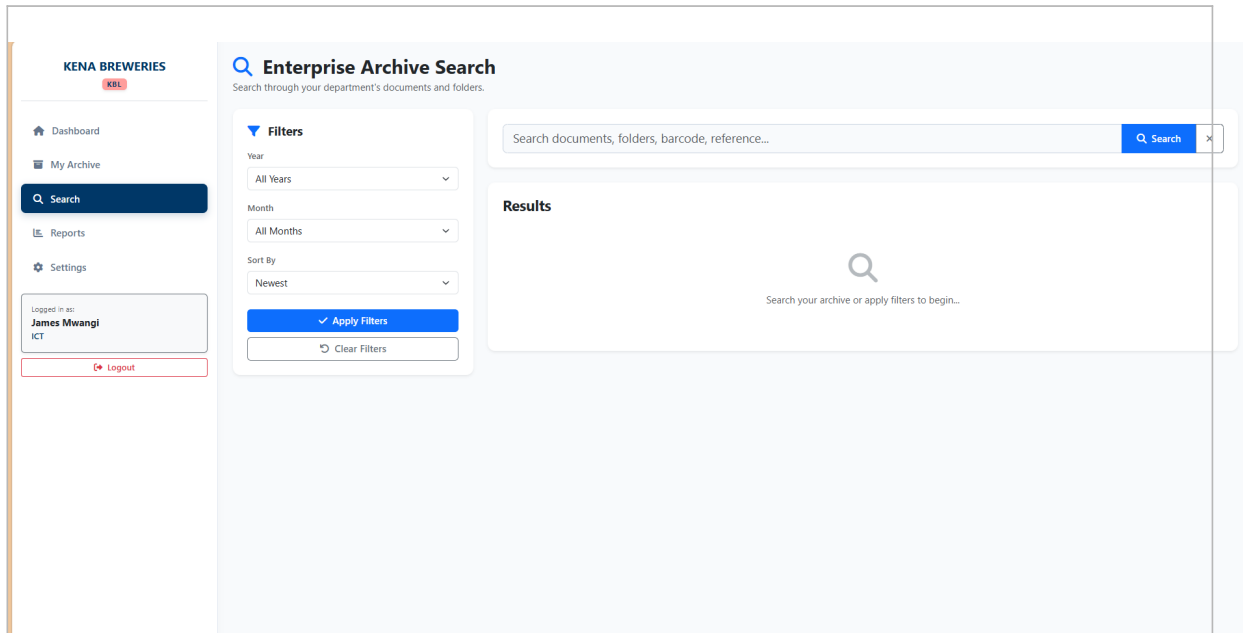


Figure 3.3 — Enterprise Archive Search, with Year/Month filters and Sort By options.

3.4 Department Analytics & Reports

Navigate to Reports for analytical insights into department file usage.

Key Metrics: Shows total file count, storage usage, and new uploads today.

Visual Charts:

- **Recent Upload Activity:** Bar graph illustrating upload frequency grouped by year.
- **Recent Upload Distribution:** Donut chart showing distribution across department folders.

Latest System Activity Table: Detailed list of recently registered files including generated Barcode IDs, filenames, and upload dates.

Export Data: Use the top buttons to **Export CSV** (raw data) or **Download PDF** (formatted report) — both are highlighted below.

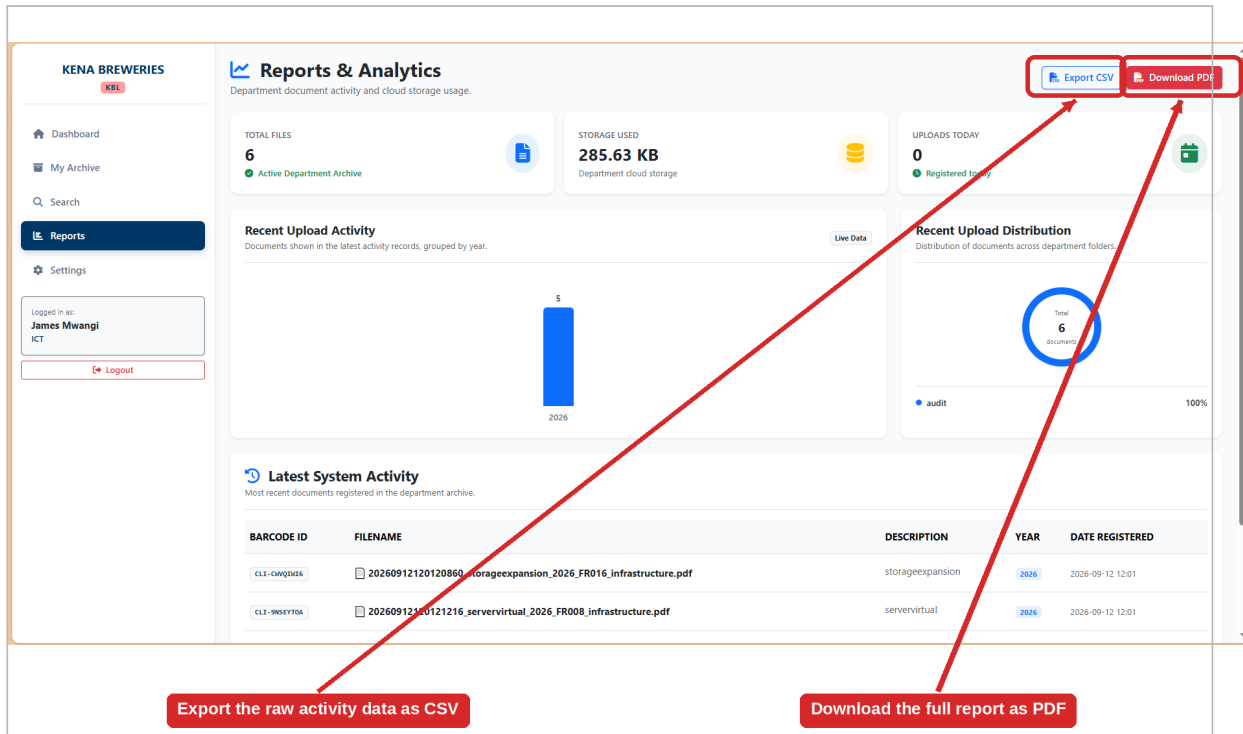


Figure 3.4 — Department Analytics & Reports. Export CSV and Download PDF buttons (top right) are outlined in red.

Note: Export CSV is best for further analysis in Excel/Sheets; Download PDF is best for sharing a polished, ready-to-read report with management.

3.5 Staff Account Settings

Navigate to Settings in the left menu to manage user account information.

- **Profile Information:** View your registered profile name and work email address. Click **Save Changes** after updating your name.
- **Change Password:** Enter your Current Password, type your New Password, confirm it, and click **Update Password**.

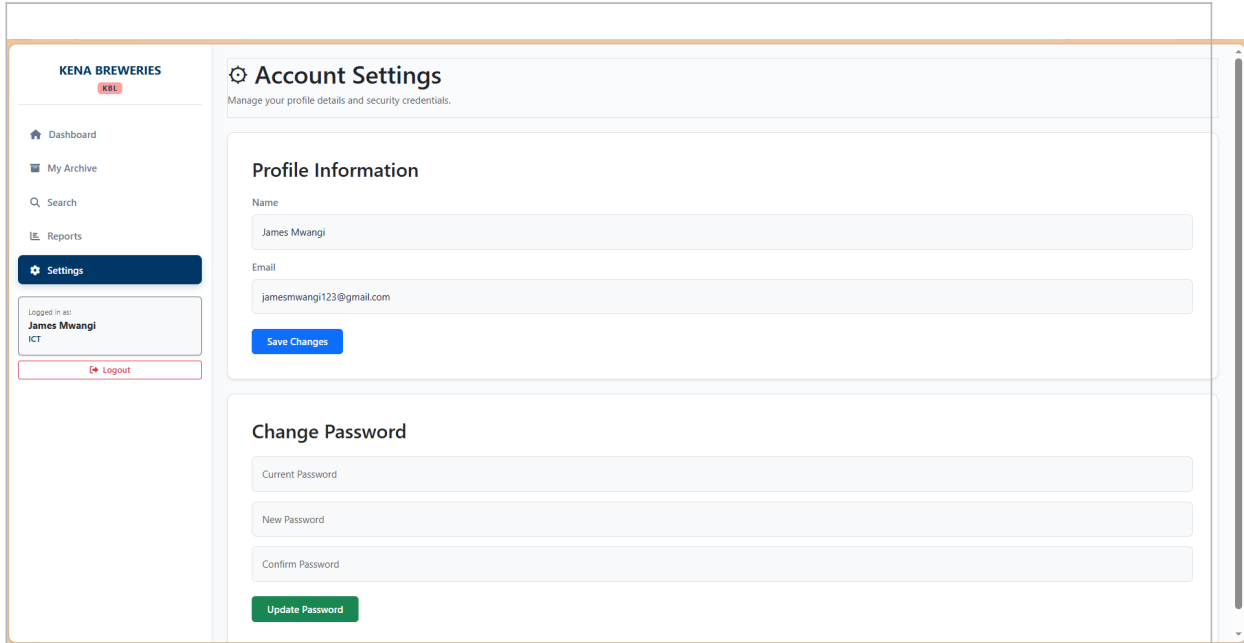


Figure 3.5 — Staff Account Settings: Profile Information and Change Password.

3.6 Help & Support

Navigate to Help & Support from the left sidebar to open the built-in System User Guide and to contact the support team directly.

System User Guide:

Click any topic card for detailed manual instructions:

- **My Archive & Directories:** Navigate to My Archive to create folder structures using the folder input. Explore department trees and view stored document indexes.
- **Uploading Files:** Use Quick Upload on your dashboard or navigate to Upload File for single files, and Bulk Upload for multi-file batch uploads.
- **Enterprise Search:** Locate physical and digital archives instantly using keywords, barcode IDs, or reference numbers. Apply year and month filters to refine results.
- **Exporting Reports & Data:** Export full inventory records with Export Catalogue, or generate formatted PDF / raw CSV activity logs from the Reports & Analytics tab.
- **Account & Access Management:** Update profile details or change account passwords under Settings. For folder access requests or role privilege extensions, use the Help Request form on the right.

Contact Support:

- **Your Name / Your Email Address:** pre-filled from your account; confirm they're correct.
- **Subject / Issue Type:** choose the category that best matches your issue.
- **Description:** describe the assistance you need or the issue you're experiencing in detail.

Click **Send Support Email** (highlighted below) to send a direct inquiry ticket to system administration.

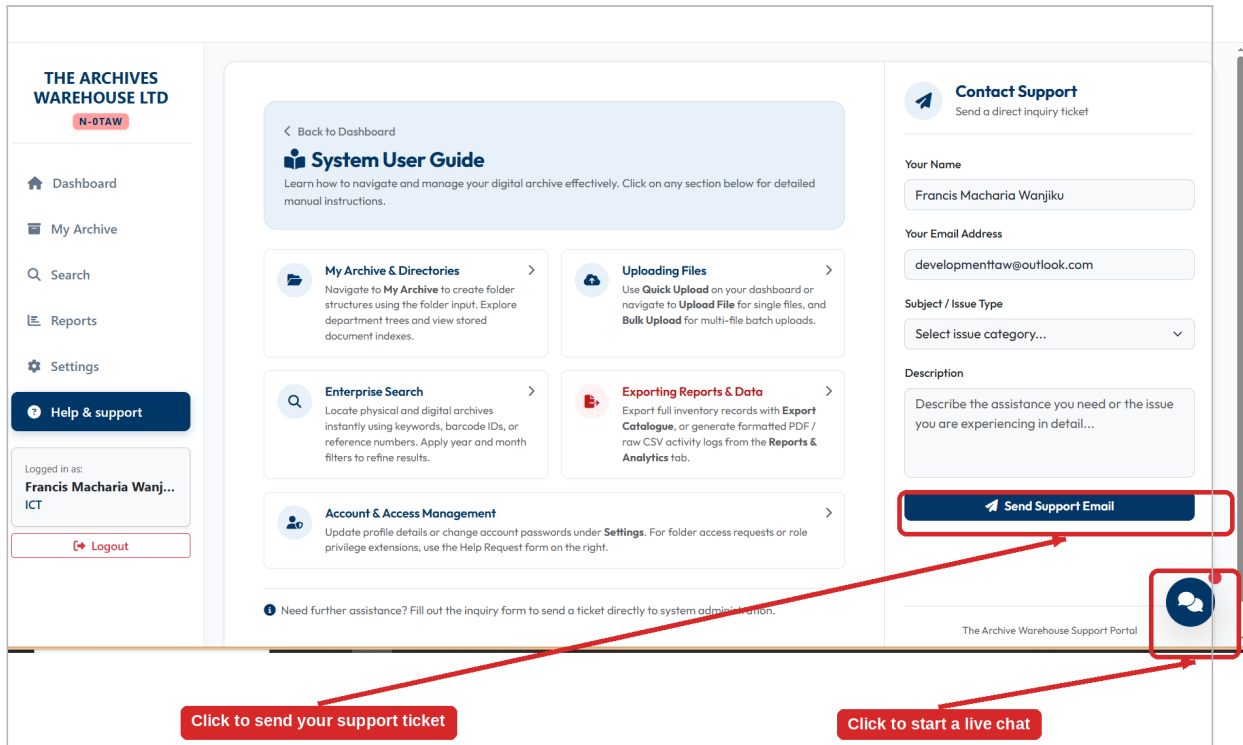
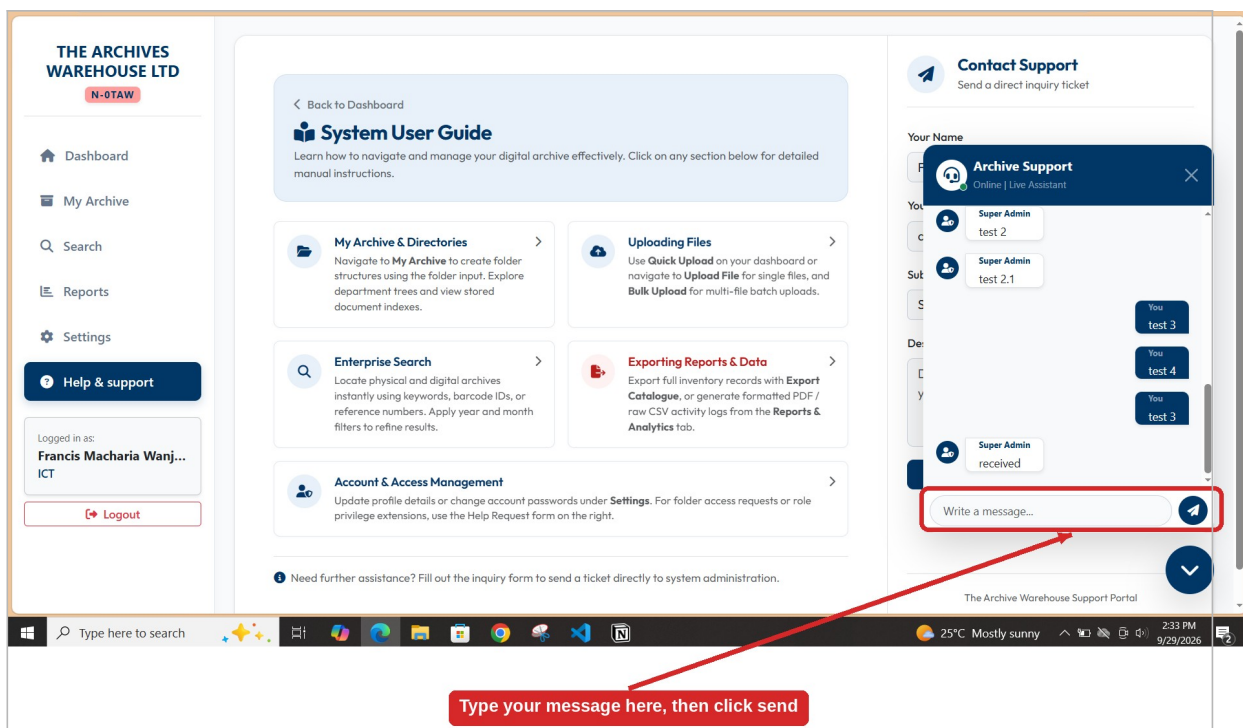


Figure 3.6a — Help & Support: System User Guide topic cards and the Contact Support ticket form. Send Support Email and the live chat bubble are outlined in red.

Live Chat: Click the chat bubble icon in the bottom-right corner (highlighted above) to open a live conversation with Archive Support for immediate assistance.

- **Type your message** in the Write a message... field, then click the send button (highlighted below).





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Figure 3.6b — Live Chat with Archive Support. The red-outlined message field and send button submit your reply.

Note: Live chat is best for urgent, quick questions while you're in the system; use the Contact Support ticket form instead for anything that needs a written record or isn't time-sensitive.