



Resources and Memos

Original – July 12th 2019

Table of Contents

Use these cross-referenced hyperlinks to help guide you through the tutorial.

[Introduction](#)

[How to create new Folders & Sub-Folders](#)

[How to create new Resources & Memos](#)

[URL Resources](#)

[Resource & Memo Reports](#)

[User View for Required Resources & Memos](#)

Resources and Memos

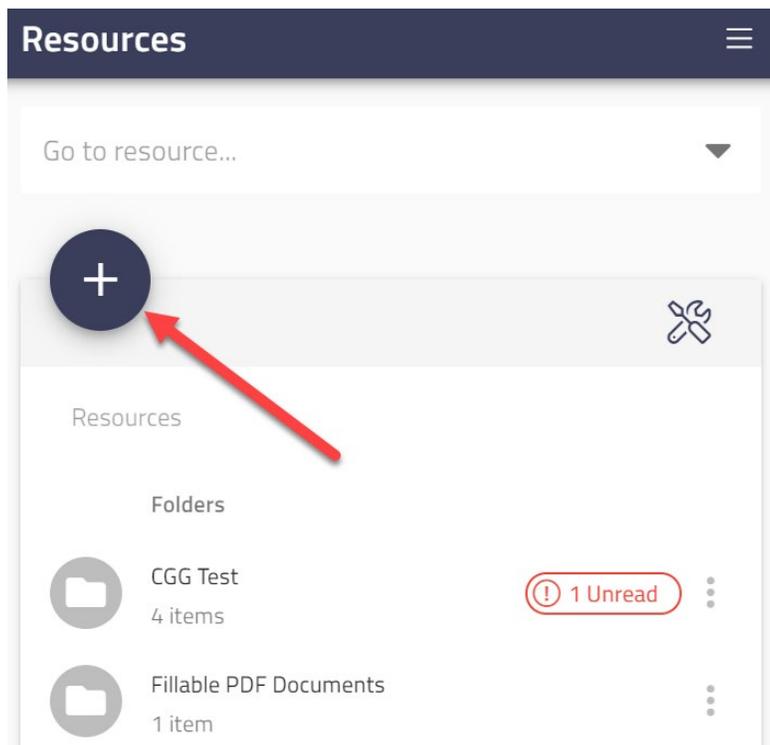
Please note that admin users should read the “Tags” tutorial prior to assigning new resources and memos.

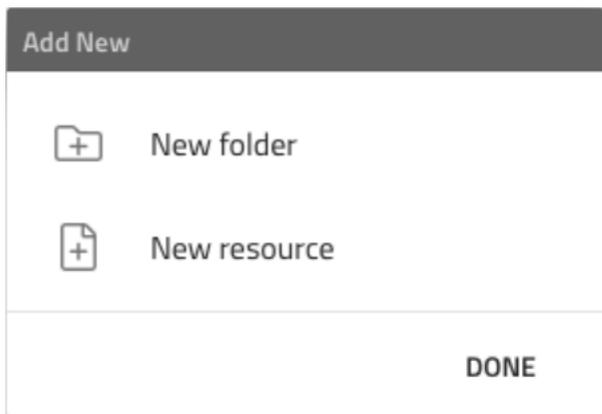
Cirro’s updated Company Library module stores all company resources, memos, and training certifications on a per user basis. These can be assigned to user types (ie. Pilot, Engineer/Mechanic, Admin, Ground) as well as to specific users or groups of users.

Once again, to assign a resource, memo, and/or training certification to a specific user or group of users, **you must first create tags**. Jump over to the Tags tutorial for a walkthrough of that process.

For example purposes, let’s say that we have a new manual which is specific to a small group of users at Company XYZ. From the main page of Cirro, select *Admin Tools->Company Library->Resources*.

If the manual does not fit into any of the existing folders, you can create a new folder by clicking the + symbol at the top right (see screenshot below) to select *New Folder*. Name the folder and click save. Keep in mind that you are able to create folders within a folder by simply opening an existing folder and performing the same action.



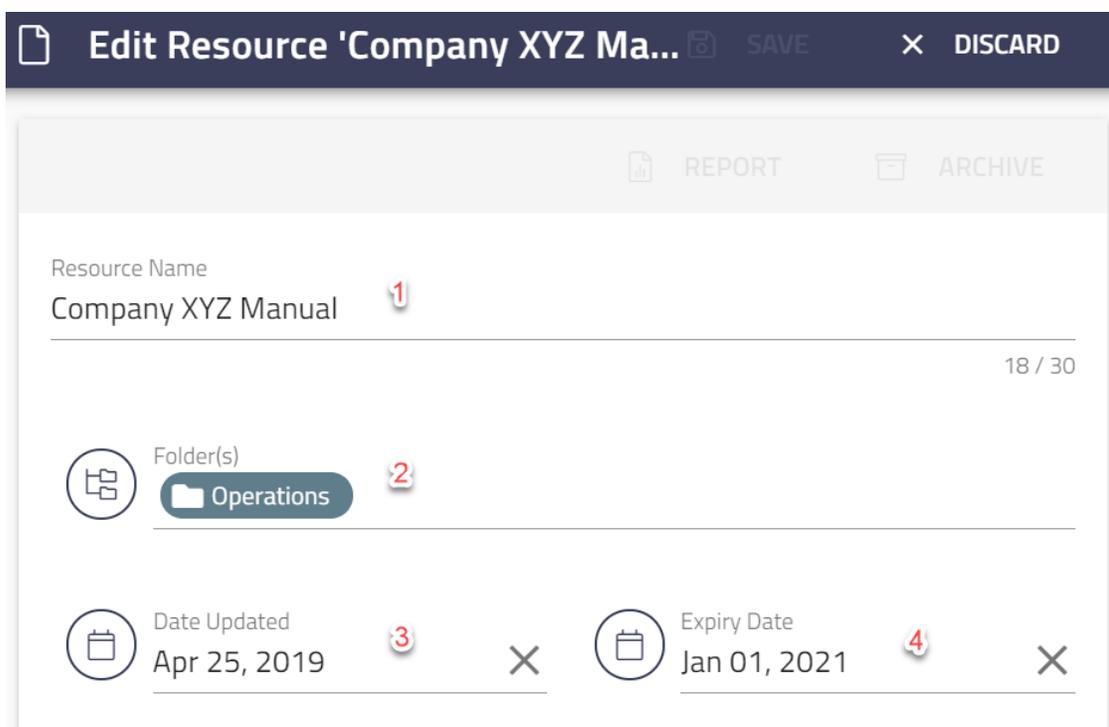


Open the folder to which the manual/resource should be added. Then, click/tap the + symbol at top left once again and select *New Resource/Memo*.

Next...

1 enter resource name

2 confirm destination folder is correct



3 input when the file was updated

4 enter the resource's expiry (leave blank if not applicable)

FILE URL

Require acknowledgement this file has been read. ¹

Require this file to be downloaded? ²

+ ADD FILE ³

 This field is required.  250 MB

- 1 Selecting this option will prompt users to sign that they have read and understood the resource after opening then closing said resource. This is an admin-reportable function to see which users have read and acknowledged a resource within Cirro (also available with Memos)
- 2 Leaving this option selected will allow the resource to be viewed by the assigned users in an offline state
- 3 Opens up the file explorer for your PC/Mac/Mobile Device to select the appropriate resource for upload. You may upload virtually any file type, as long as it is under 250 MB. Keep in mind that if the file is required to be downloaded, this will take up space on all applicable user's devices.

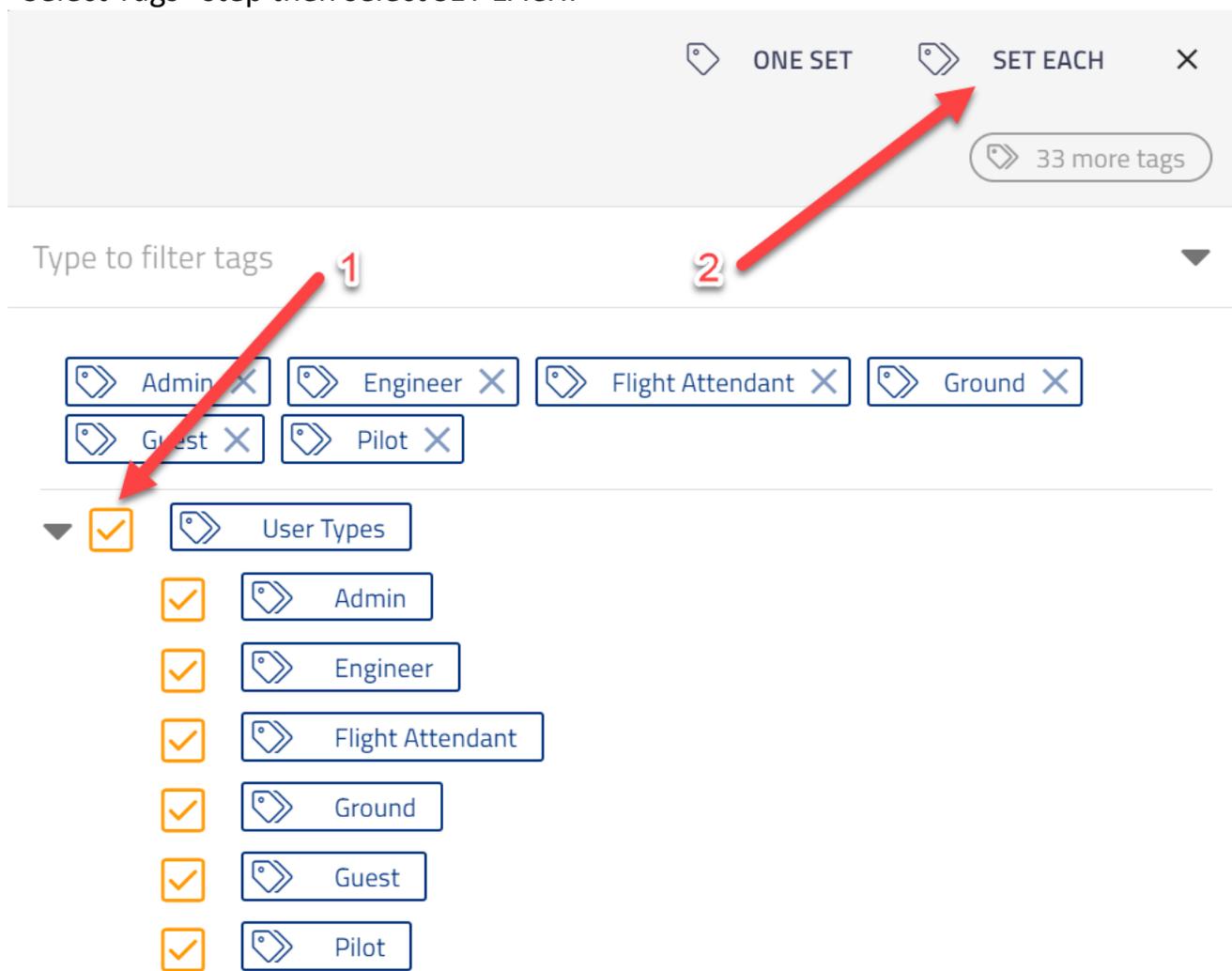
The URL option functions in the same way. IT should be noted that URLs can not be downloaded for offline use and will only be available for users in an online state. You are able to require acknowledgment on URLs.

As mentioned earlier, please review the *Tags* tutorial prior to this point. If you have not made any custom tags you will see User Types as an existing tag category to select just like the old system. When you have selected the tag or tags you wish to apply on this resource, click on either **ONE SET** or **SET EACH**.

Selecting **ONE SET** comes into play when a resource/cert/memo requires multiple tags at once.

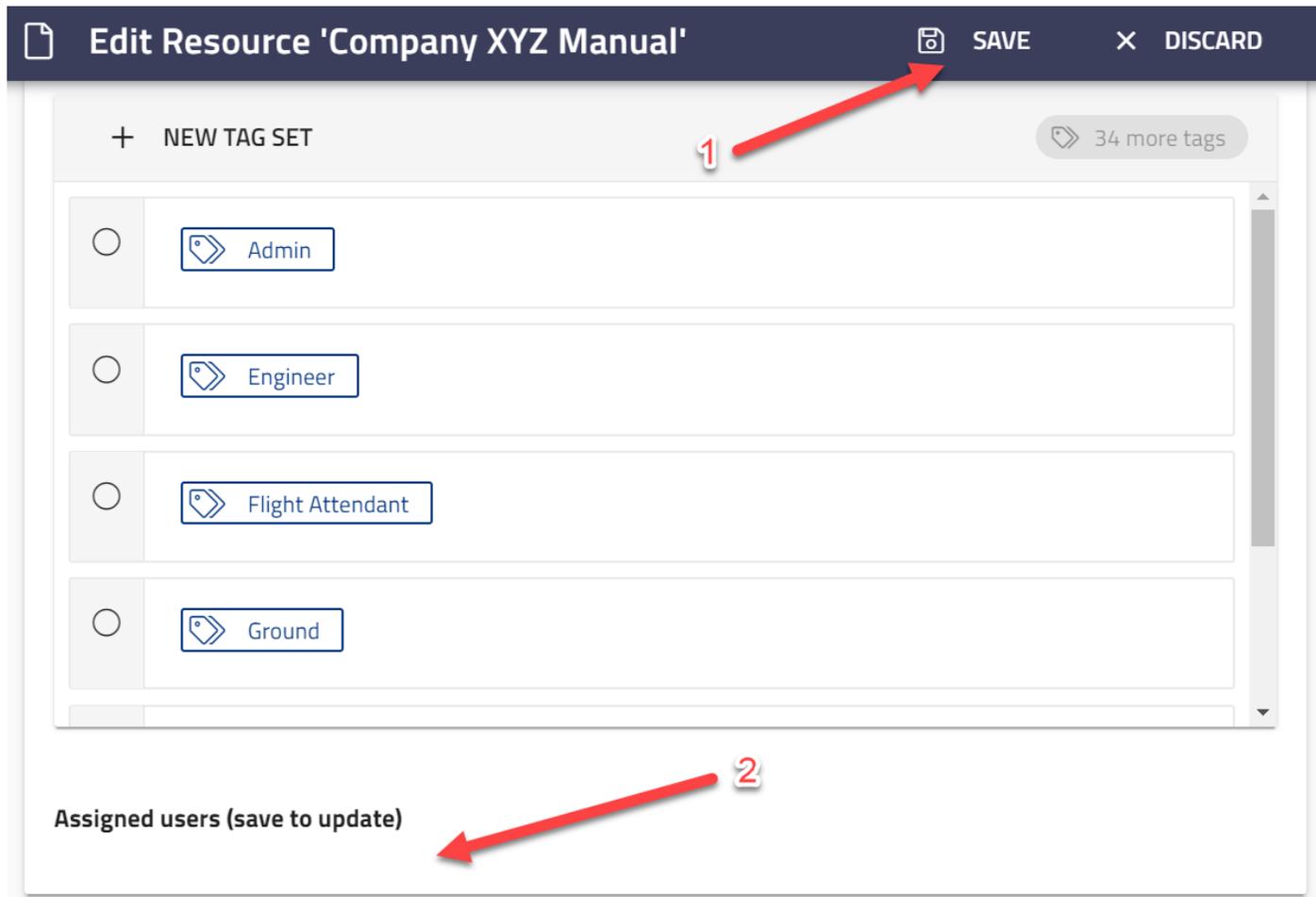
Selecting **SET EACH** should be used simply to save time if multiple tags are being applied independent of each other. For example, any pilot user or admin user or Engineer/Mechanic, etc.

In this case, you will send the manual out to all employees, so choose all user types at the “Select Tags” step then select **SET EACH**.



The screenshot displays the Cirro tagging interface. At the top, there are two action buttons: "ONE SET" and "SET EACH", with a red arrow pointing to "SET EACH" labeled "2". Below these is a search bar "Type to filter tags" with a red arrow pointing to it labeled "1". A list of tags is shown, including "Admin", "Engineer", "Flight Attendant", "Ground", "Guest", and "Pilot". Below this list, the "User Types" category is expanded, showing a list of checkboxes for "Admin", "Engineer", "Flight Attendant", "Ground", "Guest", and "Pilot", all of which are checked. A "33 more tags" button is also visible.

To see a list of users who will now receive Company Manual XYZ, select the save button, then look under Assigned Users.



Edit Resource 'Company XYZ Manual'  **SAVE**  **DISCARD**

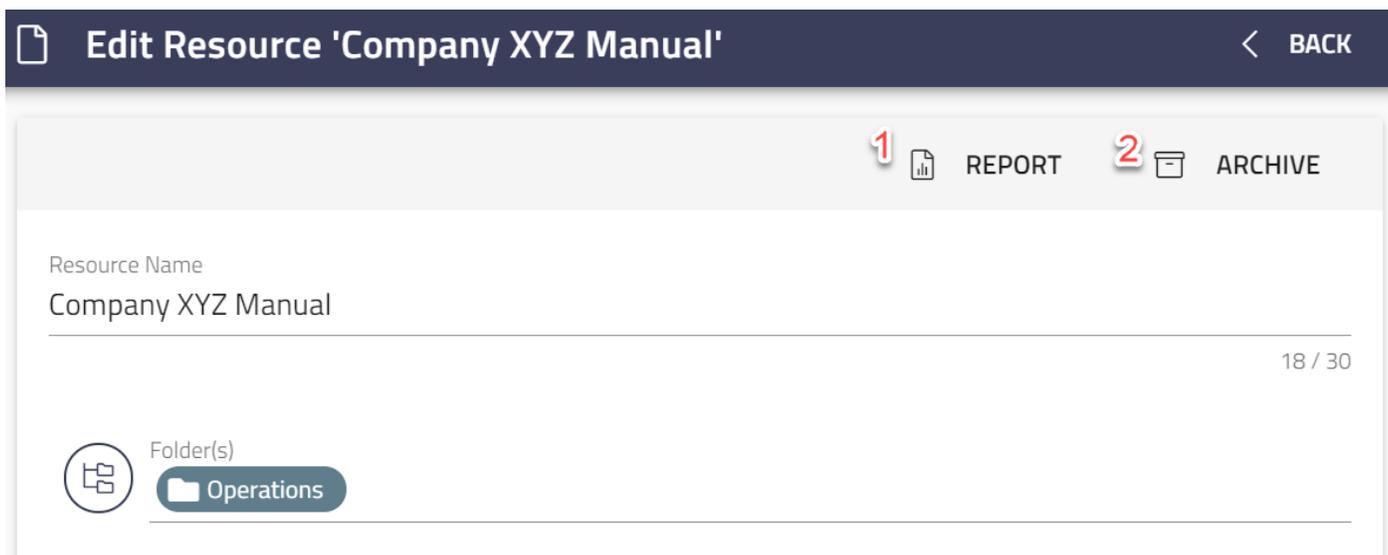
+ NEW TAG SET 34 more tags

-  Admin
-  Engineer
-  Flight Attendant
-  Ground

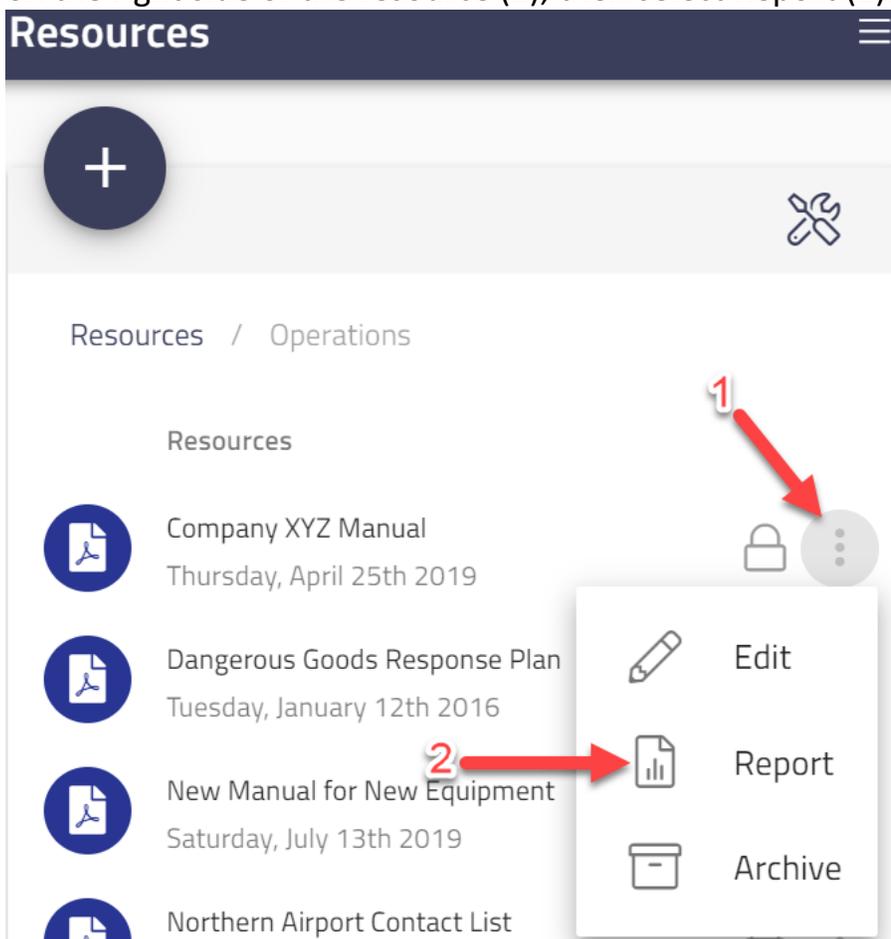
Assigned users (save to update)

After clicking Save and confirming the proper users have been assigned, scroll to the top of the page.

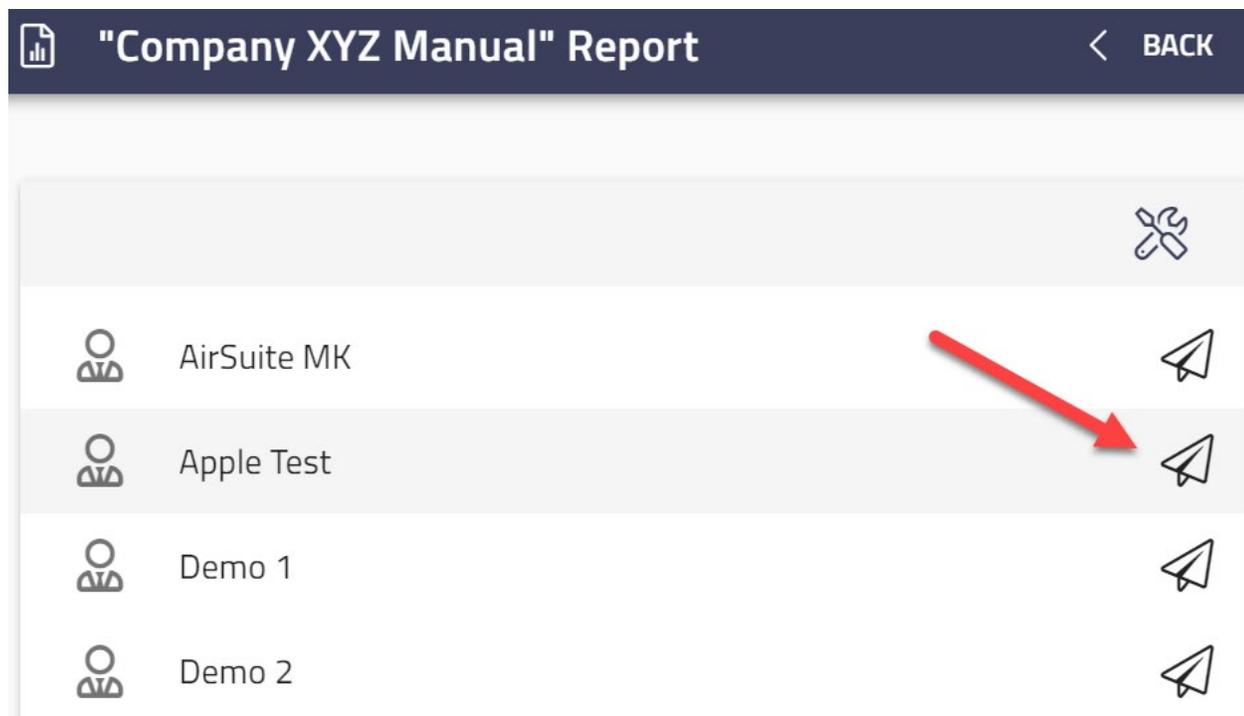
Two new options should now be available; *Report* and *Archive*. The *Report* option only shows up on resources/memos which require acknowledgment.



A resource may also be reported on from the folder in which it exists. Select the three dots on the right side of the resource (1), then select Report (2).



A resource/memo Report will give you a summary of who has read and acknowledged the resource/memo, as well as allow you to send email reminders to those who have yet to acknowledge. Clicking the paper airplane beside an individual user will send them a reminder.

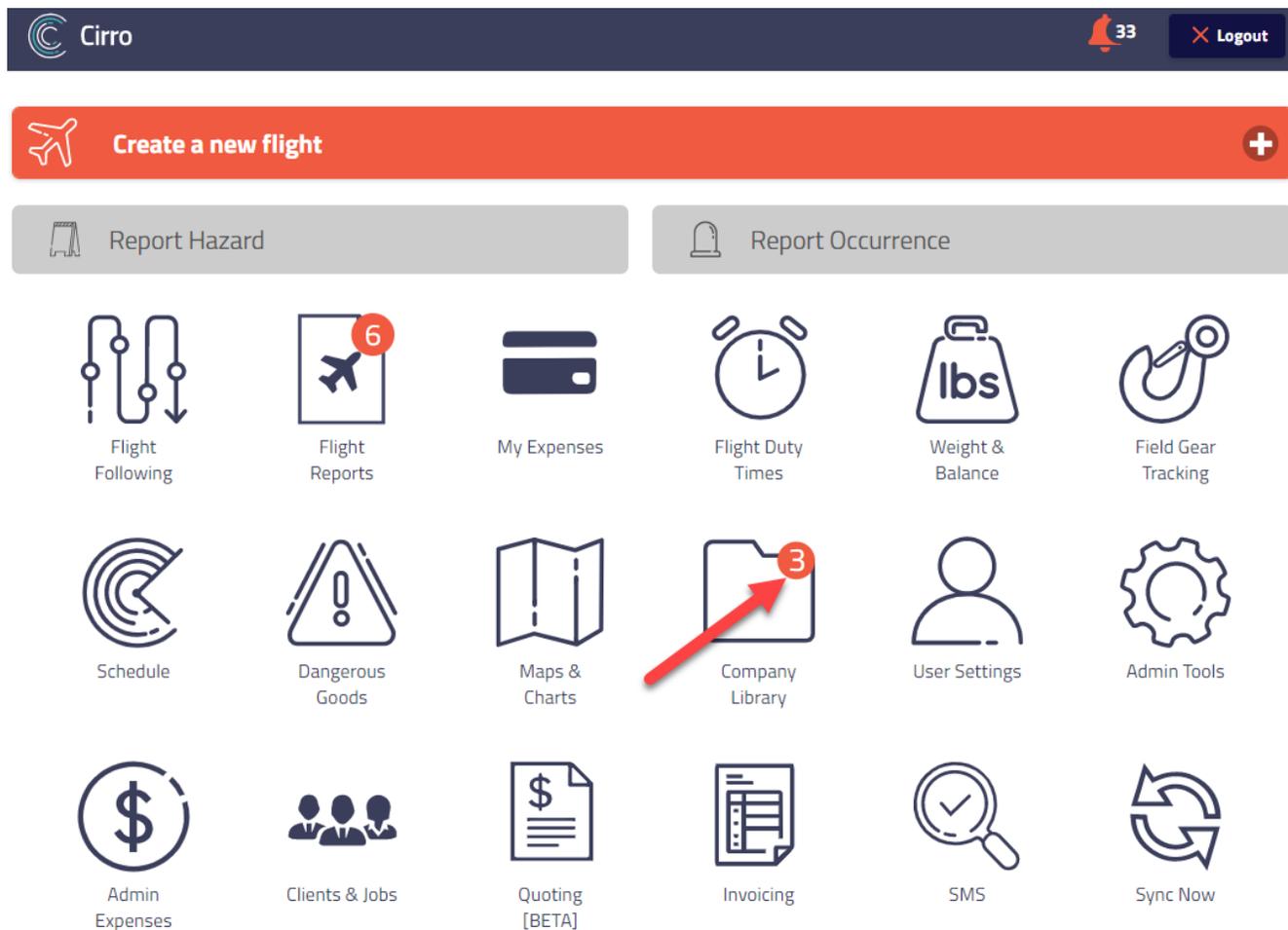


The tools icon located in top right will open up the options to:

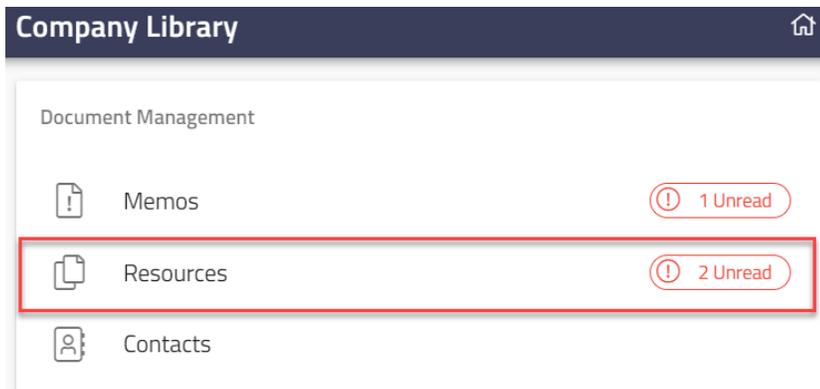
Report Tools	
 Send a reminder to all unread users	Send email reminders to all users who have not acknowledged the doc/memo
 Reset all acknowledgement statuses	Remove any existing records and require re-acknowledgment
 Export CSV...	Export all current records of acknowledgment for this doc/memo to a CSV for further reference in excel

DONE

When a user has resource(s) or memo(s) which require acknowledgment, they will be shown a number notification on the Company Library Module like so:



Clicking on the Module will then show where acknowledgement is required:

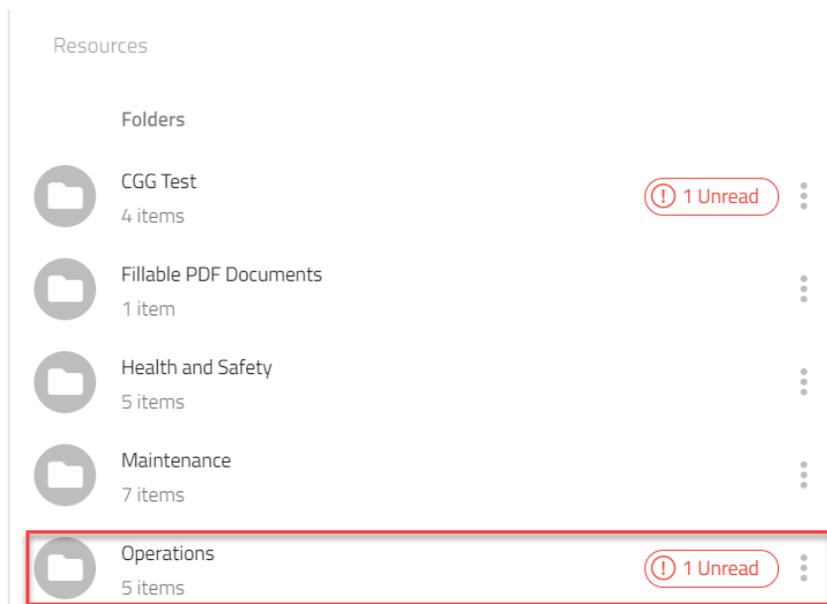


Company Library

Document Management

- Memos (1 Unread)
- Resources (2 Unread)**
- Contacts

<- Main Menu of Company Library



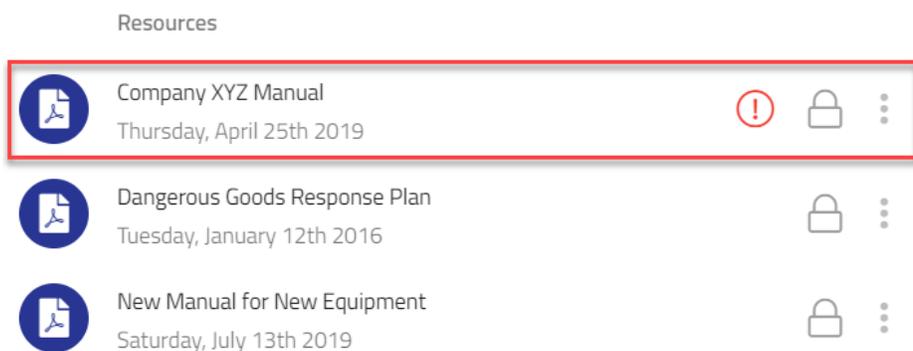
Resources

Folders

- CGG Test (4 items, 1 Unread)
- Fillable PDF Documents (1 item)
- Health and Safety (5 items)
- Maintenance (7 items)
- Operations (5 items, 1 Unread)**

Within Resources ->

Resources / Operations



Resources

- Company XYZ Manual (1 Unread)**
Thursday, April 25th 2019
- Dangerous Goods Response Plan
Tuesday, January 12th 2016
- New Manual for New Equipment
Saturday, July 13th 2019

<- Within category
"Operations"

After selecting the resource, it will open in app on mobile, or in another tab when using the web-based version of Cirro.

After closing a resource for which acknowledgment is required, the user will see the following signature box indicating that they have read and understood the resource.



The image shows a signature box interface. At the top is a yellow header bar with a pencil icon on the left, the text "Please Sign Below" in the center, and a circular arrow icon on the right. Below the header is a large white area containing a handwritten signature in black ink that reads "Hello World!". At the bottom of the signature area is a dark blue bar containing the text "I have read and understood 'Company XYZ Manual'" in white. To the right of this text are two buttons: "CONFIRM" with a checkmark icon and "CANCEL" with an 'X' icon.