Cirro

Resources and Memos

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AirSuite

AirSuite Inc.
www.air-suite.com

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Resources and Memos

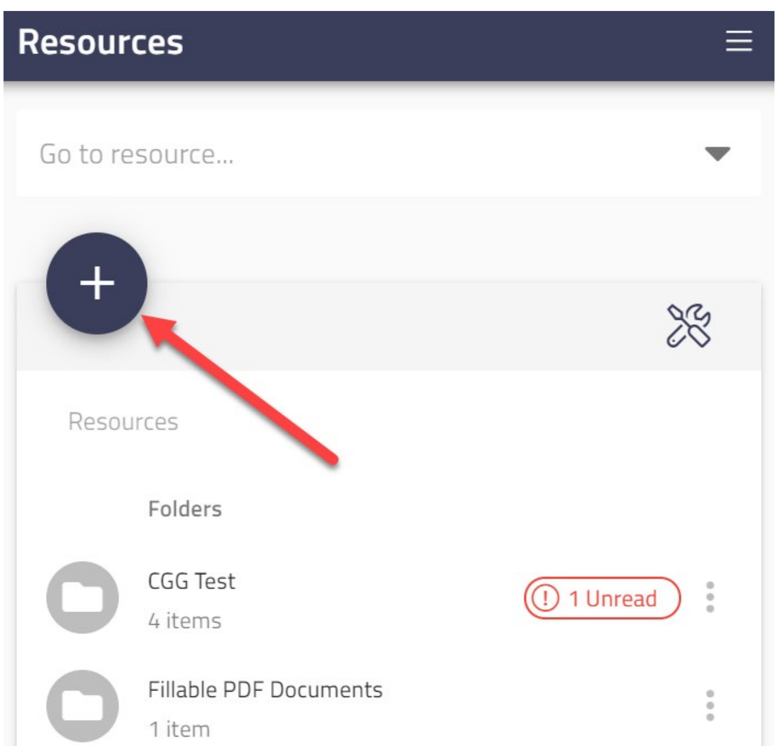
Please note that admin users should read the "Tags" tutorial prior to assigning new resources and memos.

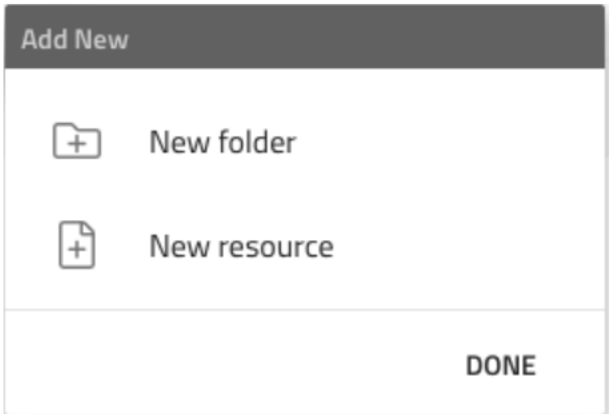
Cirro's updated Company Library module stores all company resources, memos, and training certifications on a per user basis. These can be assigned to user types (ie. Pilot, Engineer/Mechanic, Admin, Ground) as well as to specific users or groups of users.

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.*

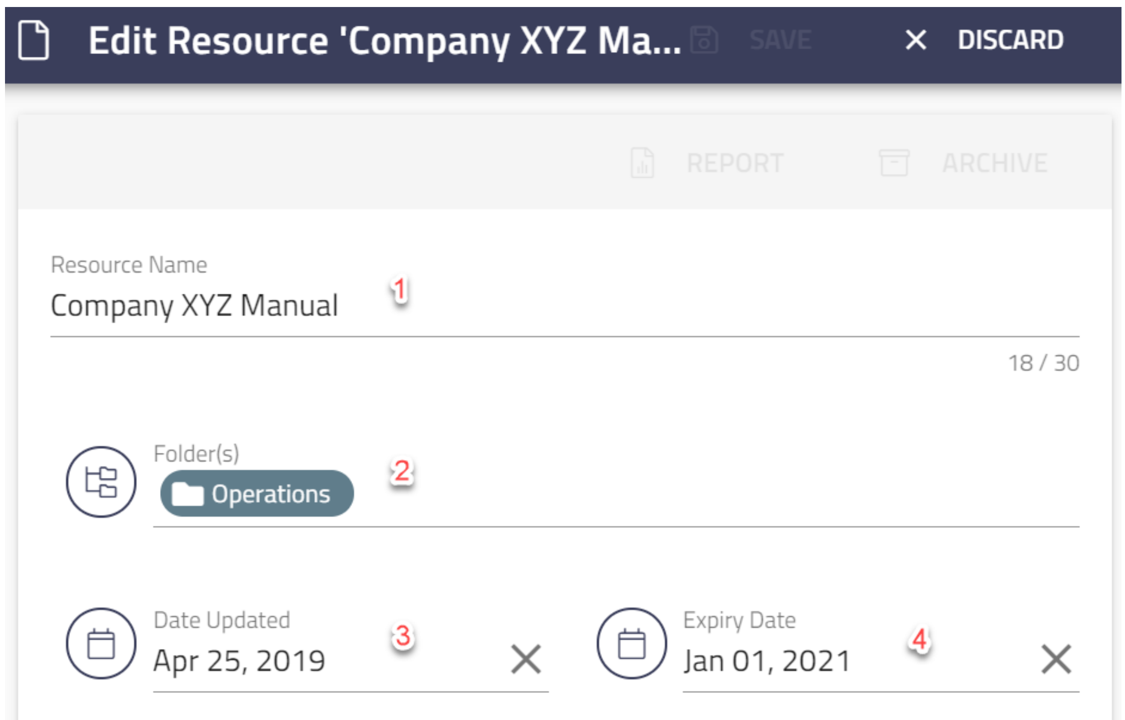
If the manual does not fit into any of the existing folders, you can create a new folder by clicking the **+** symbol at the top right (see screenshot below) to select *New Folder.* Name the folder and click save. Keep in mind that you are able to create folders within a folder by simply opening an existing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

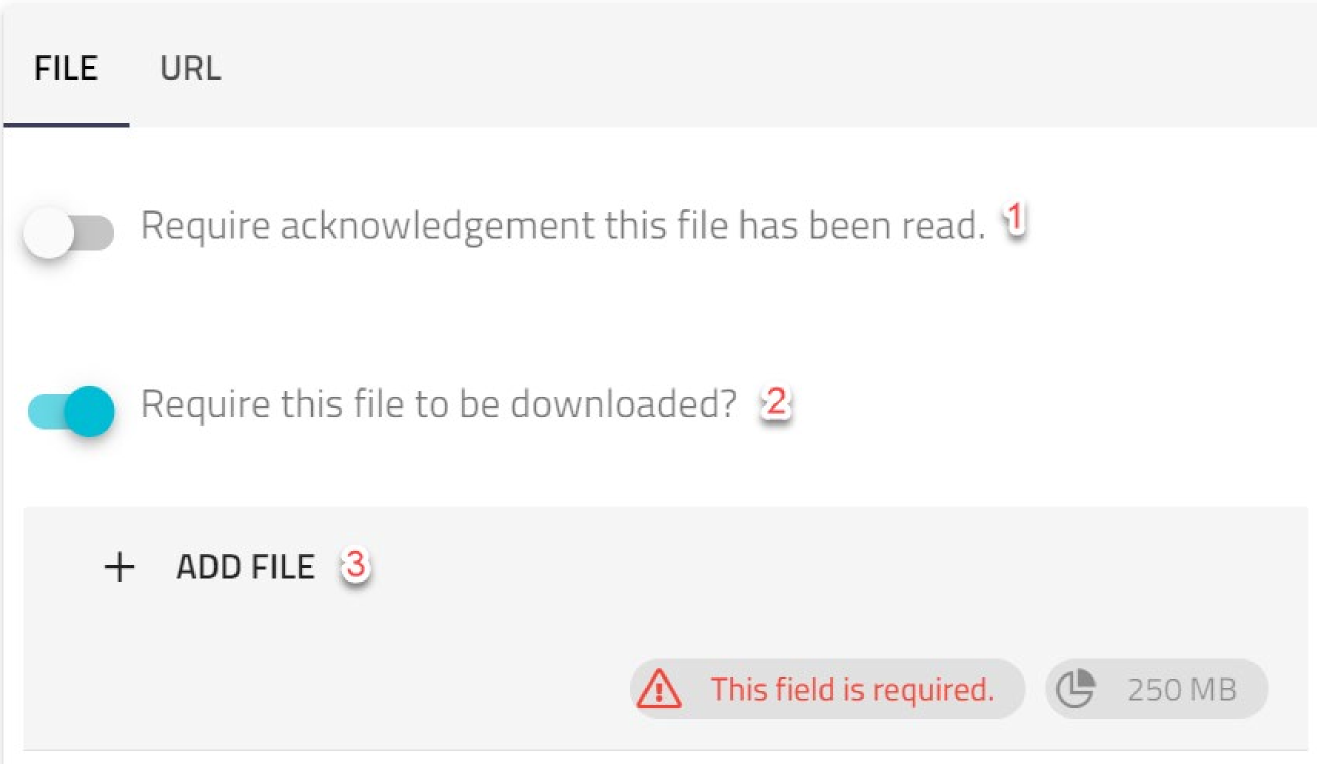


1 enter resource name

2 confirm destination folder is correct

3 input when the file was updated

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



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

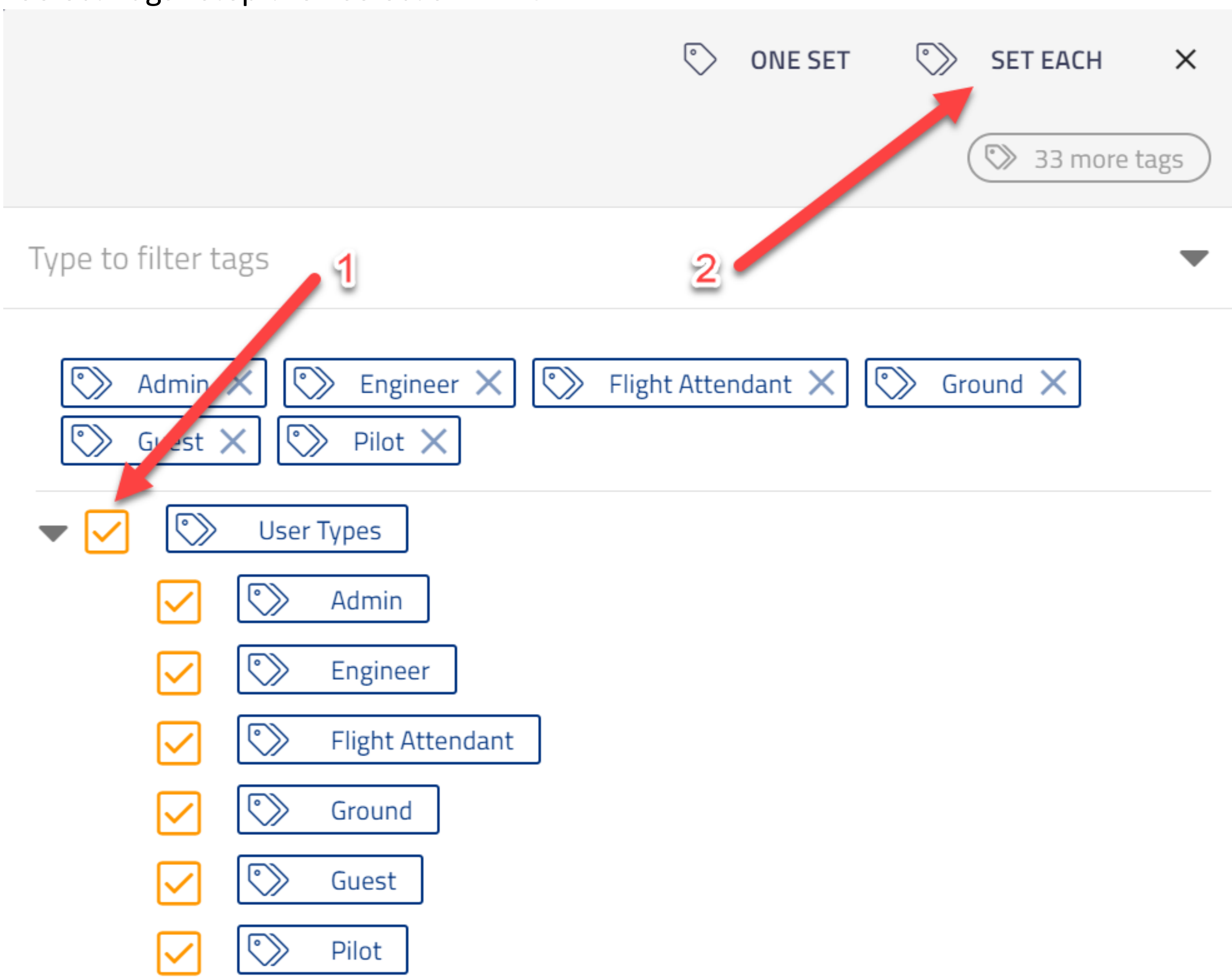
3 Opens up the file explorer for your PC/Mac/Mobile Device to select the appropriate resource for upload. You may upload virtually any file type, as long as it is under 250 MB. Keep in mind that if the file is required to be downloaded, this will take up space on all applicable user's devices.

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.

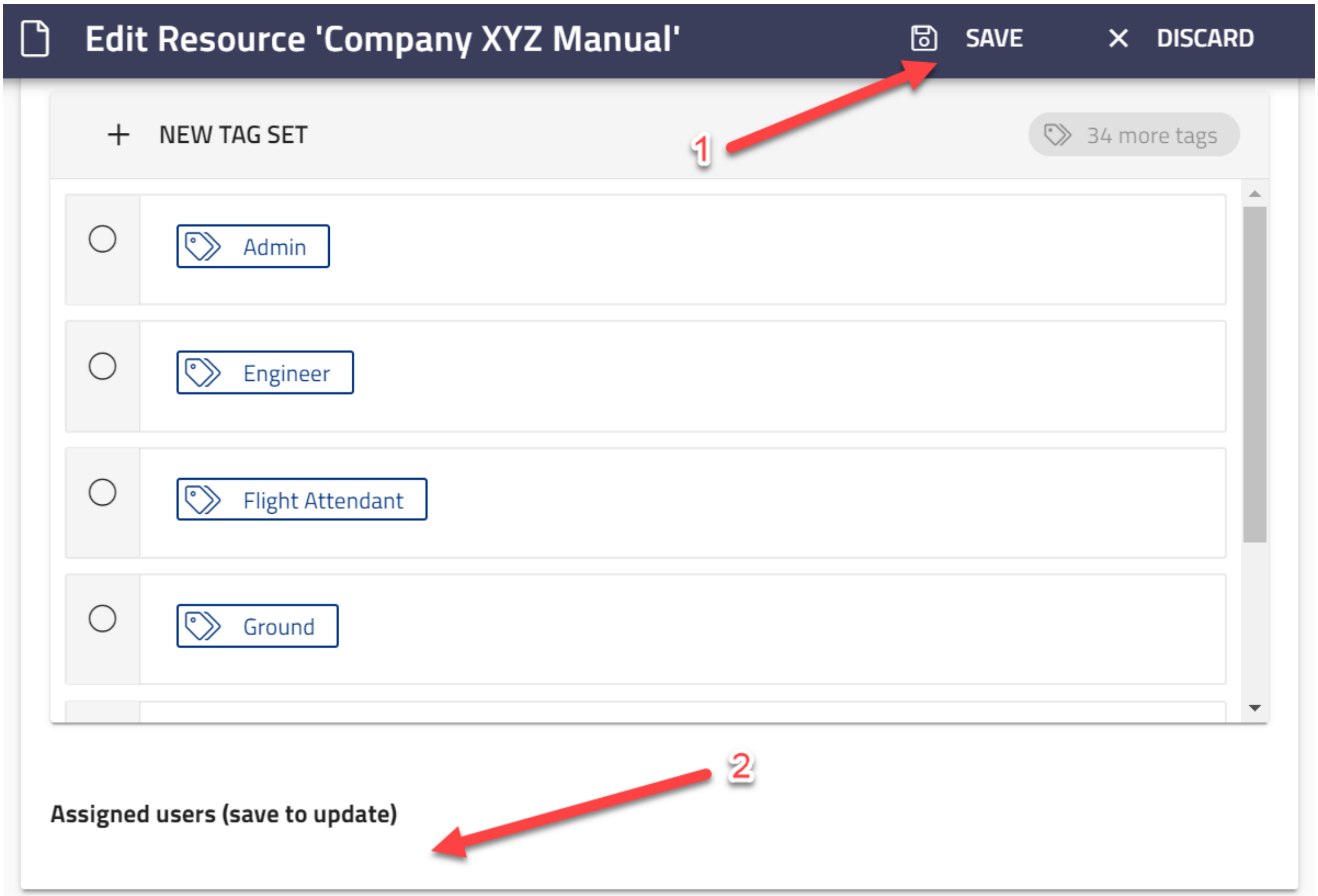
As mentioned earlier, please review the *Tags* tutorial prior to this point. If you have not made any custom tags you will see User Types as an existing tag category to select just like the old system. When you have selected the tag or tags you wish to apply on this resource, click on either ***ONE SET***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

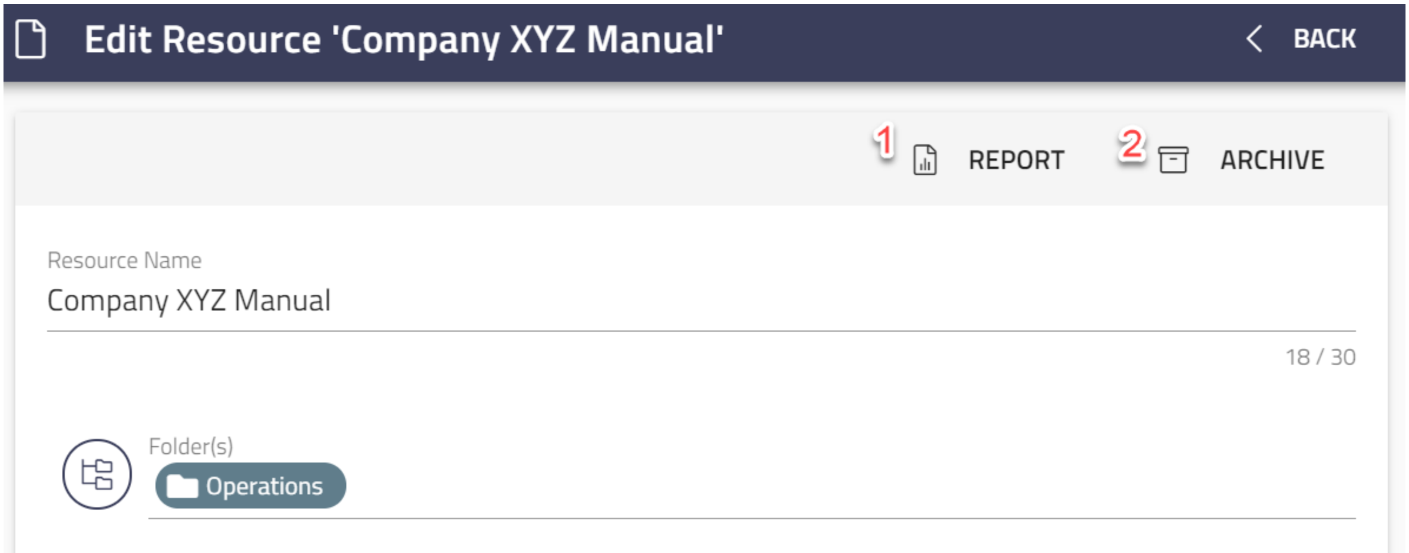


To see a list of users who will now receive Company Manual XYZ, select the save button, then look under Assigned Users.

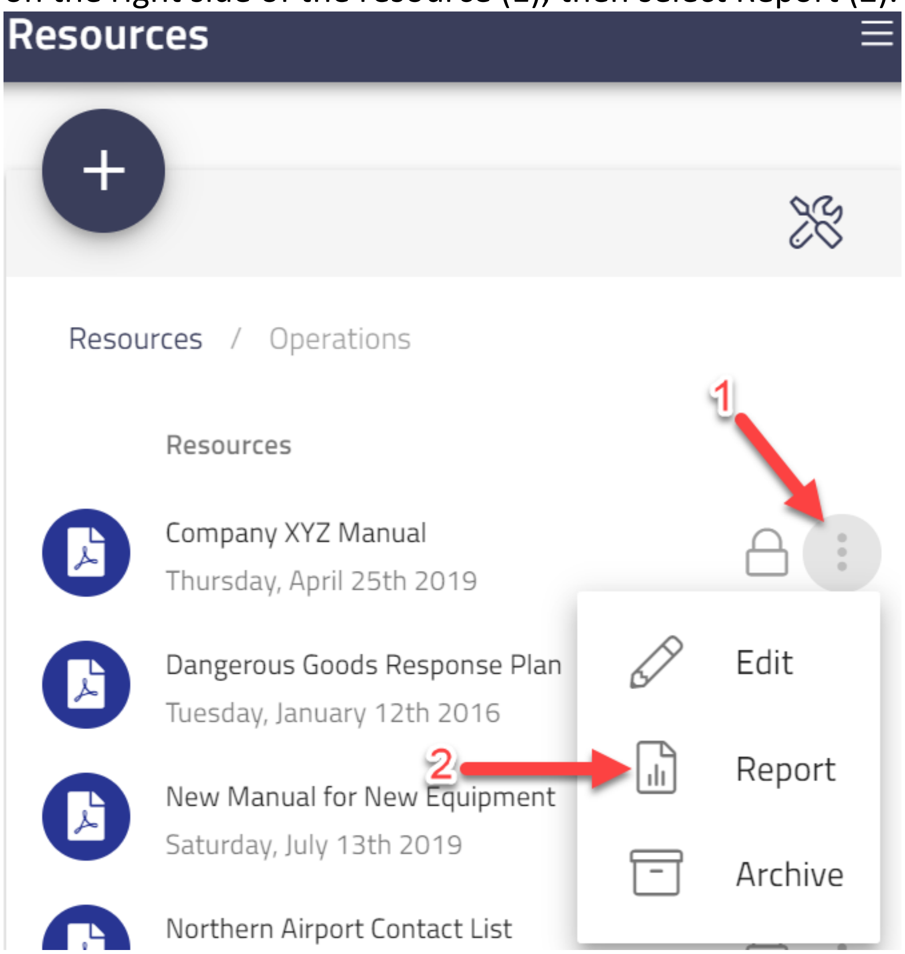


After clicking Save and confirming the proper users have been assigned, scroll to the top of the page.

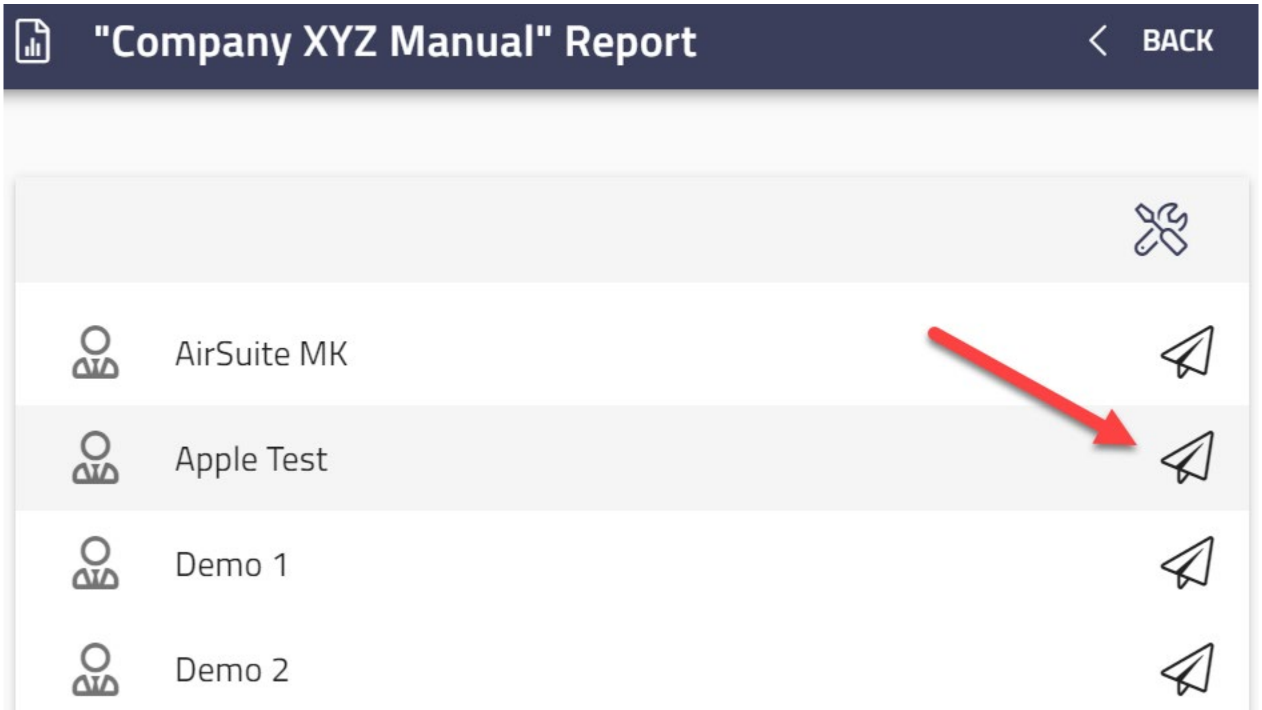
Two new options should now be available; *Report* and *Archive.* The *Report* option only shows up on resources/memos which require acknowledgment.



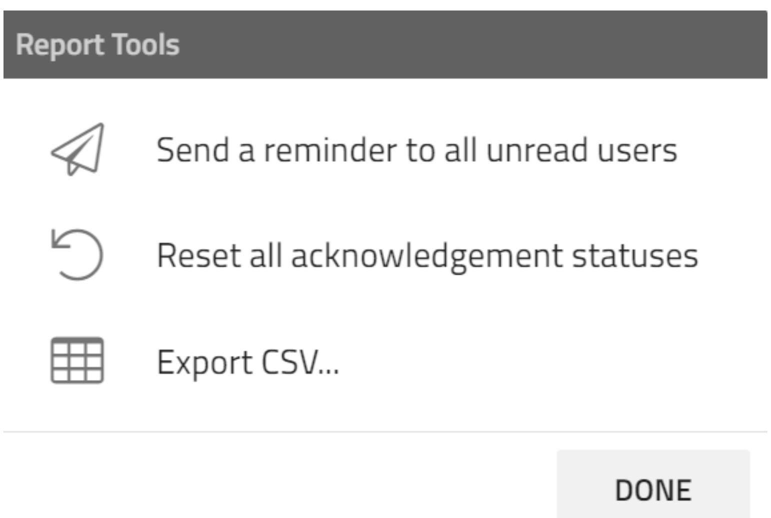
A resource may also be reported on from the folder in which it exists. Select the three dots on the right side of the resource (1), then select Report (2).



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:

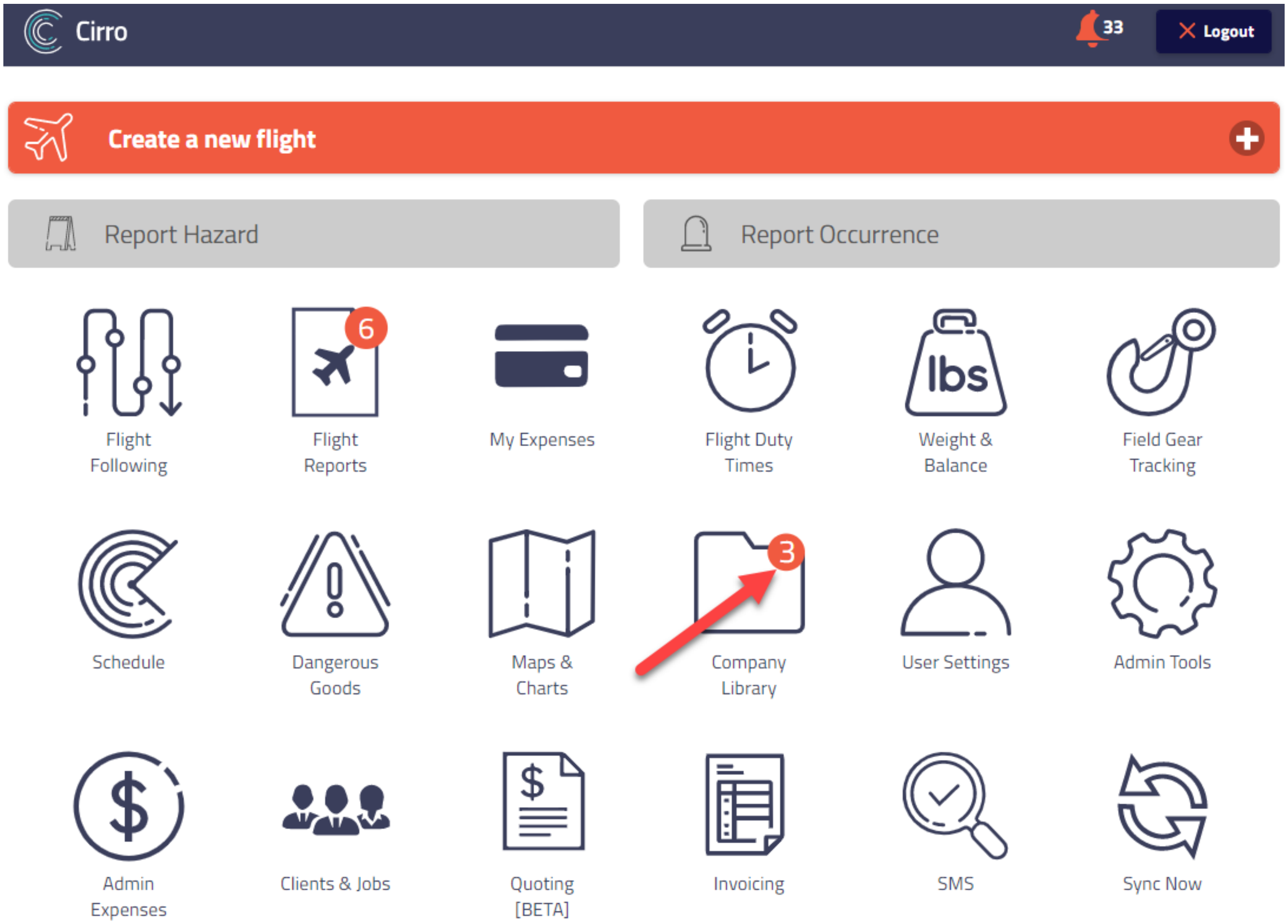


Send email reminders to all users who have not acknowledged the doc/memo

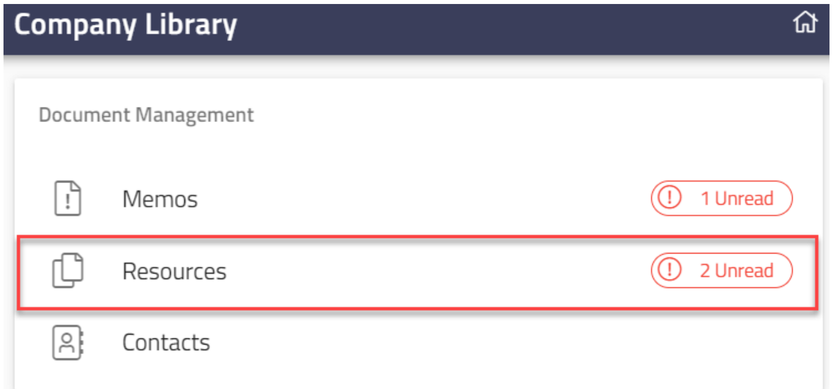
Remove any existing records and require re-acknowledgment

Export all current records of acknowledgment for this doc/memo to a CSV for further reference in excel

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:

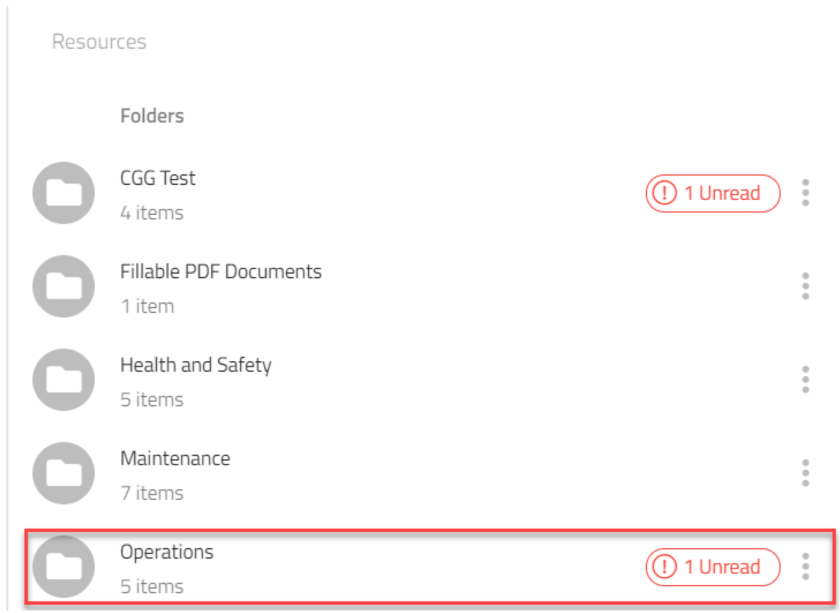


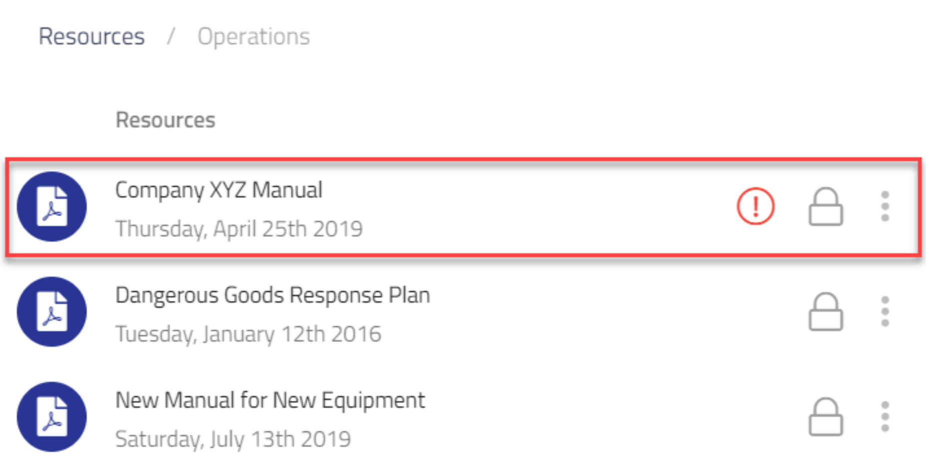
Clicking on the Module will then show where acknowledgement is required:



<- Main Menu of Company Library

Within Resources ->





<- 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.