




SmartUse Web Portal: Document Management

How to create a project.....	2
How to rename a project.....	3
How to create a folder	4
How to rename a folder	5
How to copy and paste a folder in the same project.....	5
How to upload documents	6
How to automatically publish documents	8
How to rotate a document.....	8
How to change the version name	9
How to delete a version of documents	10
How to modify a document name	11
How to modify the document title.....	11
How to choose custom document ordering patterns	12
How to allow admins to create, rename and delete projects	13

How to create a project

1. Access SmartUse [Web Portal](#)

2. Click on the  located in the upper right corner of the page.

3. Enter the name of the project. You can select to copy the folder structure from an existing project from the drop-down menu or leave it empty to create a new folder structure. Click "Create project" at the bottom of the window.

Create Project ×

PROJECT NAME

--- Empty project ---

COPY FOLDER STRUCTURE FROM PROJECT...

Create Project

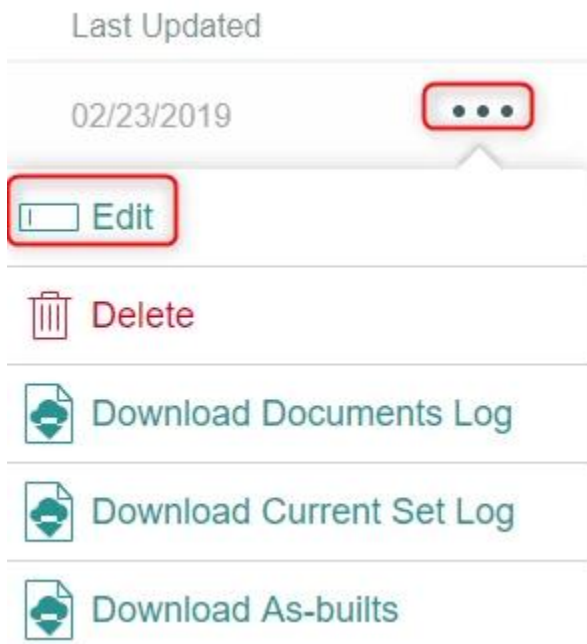
4. You will then see your available projects displayed

Projects				Franglais	Download	...
Name	Role	Organization	Last Updated			
Project #1	Admin (Doc. Control)	SmartUse (Jeff)	a few seconds ago	...		

Question? Chat with us.

How to rename a project

1. Select the project you wish to modify
2. At the far right, click the 3 dots and select Modify



3. Modify the project name as necessary and click **Save**

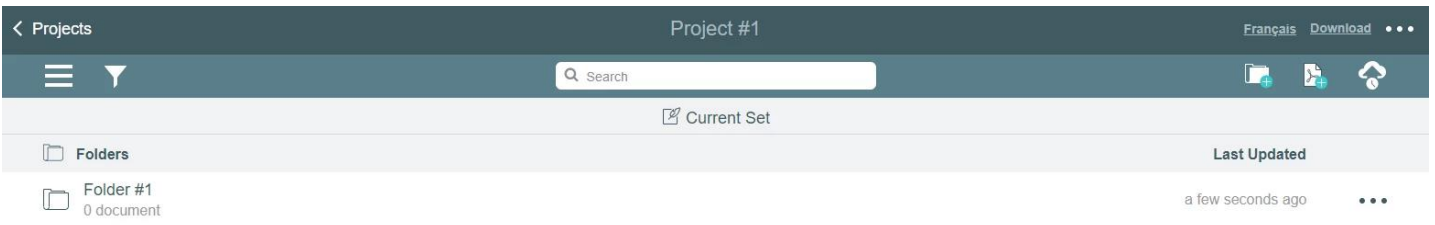
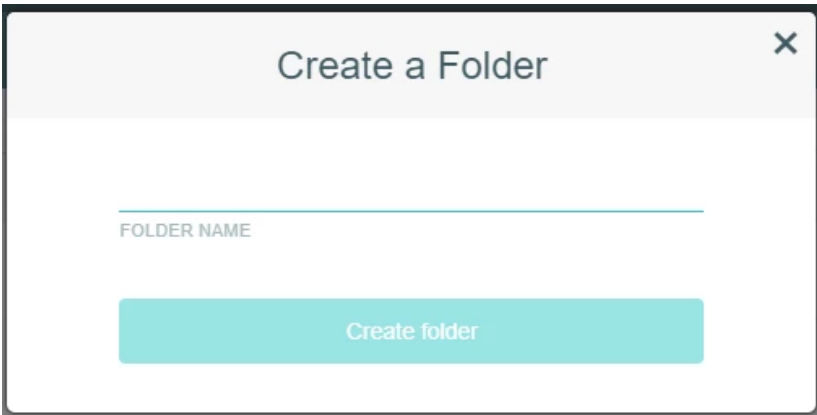
A screenshot of the 'Edit your project' dialog box. The title bar at the top says 'Edit your project' with a close button (X) on the right. Below the title bar, there is a text input field containing 'Test Project|' with a light blue underline. Below the input field, the text 'PROJECT NAME' is displayed. Below that is a dropdown menu showing '(UTC-05:00) Eastern Time (US & Canada)' with a downward arrow on the right. Below the dropdown, the text 'TIME ZONE' is displayed. Below that is a horizontal line, and below the line, the text 'DOCUMENT ORDERING PATTERNS, COMMA-SEPARATED' is displayed. At the bottom of the dialog is a large teal button with the text 'Save' in white.

How to create a folder

1. Click on the project where you wish to create the folder in
2. Click on the folder creation button located in the upper right corner of the page



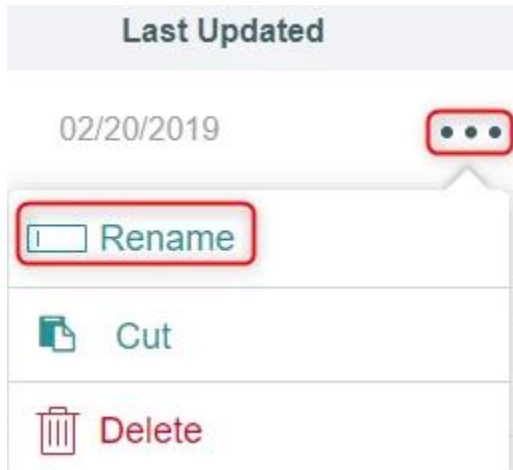
3. Enter the name of the folder and click "Create folder" on the following window. You will then see you new folder available displayed



4. Repeat steps 2 to 3 to create as many folders as required. You can repeat those steps within a folder to create new sub-folders.

How to rename a folder

1. Select the project and then folder you wish to rename
2. At the far right, click the 3 dots and select Rename

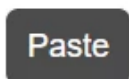
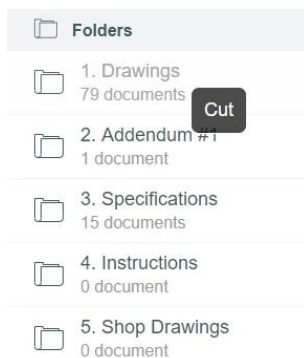


3. Rename your folder as necessary and click **Save**



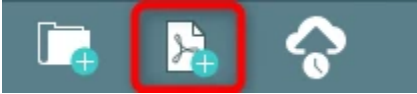
How to copy and paste a folder in the same project

1. Right-click on the folder to cut and do the same to paste it in the desired location of the same project.



How to upload documents

1. Once you're connected and into the right project and/or folder, you simply have to click in the middle logo located in the upper right corner



2. You will then have the option to upload drawings or documents, once all your documents have been dragged and dropped, click Next

Upload Documents ×

Choose the type of PDF documents you want to upload:

Drawings

- Trim the revision suffix at the end of the sheet name (Ex: A100.00 will be A100)
- Use the original PDF document names and do not make any sheet name detection

Documents (Shop drawings, Specs, RFIs, Bids, etc.)

- Split the multi-page PDF
- Automatically publish the documents

Drag and drop PDFs here

3. Enter the version information

Version Information × 100 %

VERSION NAME Ex: Initial Set, Addendum #1, etc.

02/25/2019 09:33 AM

ISSUE DATE

4. Enter revision information, as well as a description or any tags if necessary

Review sheets (Initial Set - 02/20/2019) ✕

Q Search [BATCH OPTIONS](#) Tag All Sheets

Sheet 1 of 1 (A101.PDF) This sheet will be the revision 0 of A101 Discard

A101

SHEET NUMBER

SHEET TITLE

SHEET DESCRIPTION

TAGS

5. You can also select batch options to apply to all pages

[BATCH OPTIONS](#) Tag All Sheets

Apply to All Sheets

Custom Regions

Use PDF name

Trim revision Suffix

6. Once finished, select the users you wish to notify either individually or by clicking Select All then click on Publish at the bottom of the page

Choose who to notify by email

Select All / Unselect All

Administrator

- Marc-Antoine Leclerc

Power collaborator

- Jeff Drouin

How to automatically publish documents

1. Click to upload documents



2. Select documents and click to check Automatically Publish Documents

Upload Documents ×

Choose the type of PDF documents you want to upload:

Drawings

- Trim the revision suffix at the end of the sheet name (Ex: A100.00 will be A100)
- Use the original PDF document names and do not make any sheet name detection

Documents (Shop drawings, Specs, RFIs, Bids, etc.)

- Split the multi-page PDF
- Automatically publish the documents

3. The PDF name of the document will be used as the sheet title and you will be notified by email as soon as they are published

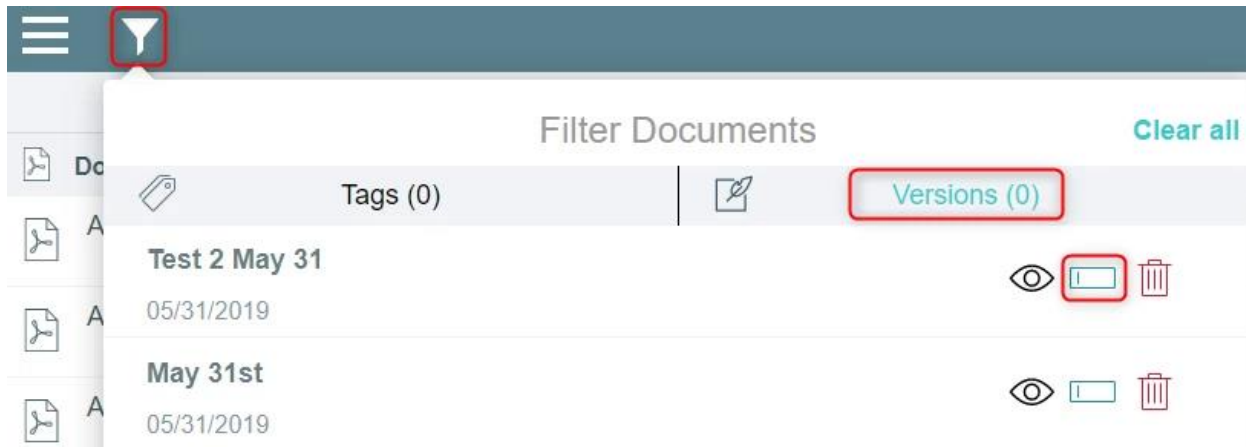
How to rotate a document

1. From your desired project, click on the document you wish to rotate and use the arrows



How to change the version name

1. Within the desired project, click on the filter and select Versions



2. Click on the icon between the eye and garbage can



3. Rename your version and click **Save**



How to delete a version of documents

1. Click on the project that you want to delete a version on
2. Click on the filter icon



3. Click on the garbage can beside the version that you wish to delete

Addendum #1

2019-02-05



4. Write DELETE to confirm

Warning: All documents from version **Initial Set (1)** will be deleted, as well as contained markups.

To confirm the PERMANENT deletion, please type 'DELETE' in the textbox below and then confirm by pressing the Delete button.

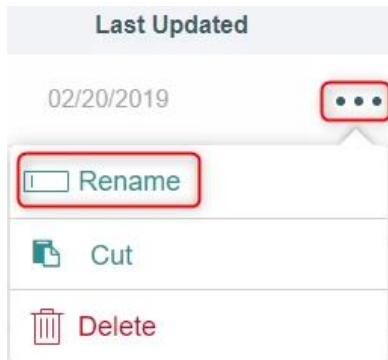
DELETE

Delete

5. Click on the delete button

How to modify a document name

1. Select the project and then document you wish to rename
2. At the far right, click the 3 dots and select Rename



3. Rename your document as necessary and click Save



How to modify the document title

1. Access the document you wish to modify
2. Click on the Revision #



3. Click on Edit

Revision 0
Initial Set
02/20/2019 1:36 pm



4. A screen will then open allowing you to modify the document title

Edit revision 0 of A101

Revision 0
Initial Set
02/20/2019 1:36 pm

Site Plan

DOCUMENT TITLE

DOCUMENT DESCRIPTION

TAGS

Save

5. Click save once done

How to choose custom document ordering patterns

1. Click on 3 dots beside your project and then on Edit.

2 days ago

...

Edit

Delete

Download Documents Log

Download Current Set Log

Download As-builts

2. You then have an option to enter document ordering patterns. (Example: Documents that start with E come before documents that start with A). **Note that this option is only available for owner's unless they have given access to Administrators to modify on their behalf.**

Edit your project

Test Project

PROJECT NAME

(UTC-05:00) Eastern Time (US & Canada)

TIME ZONE

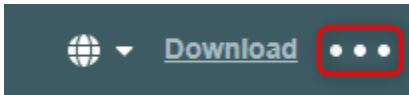
E, A

DOCUMENT ORDERING PATTERNS, COMMA-SEPARATED

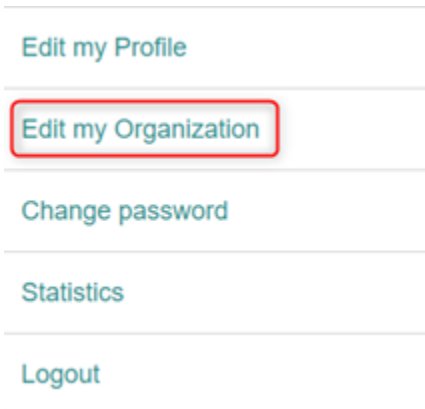
Save

How to allow admins to create, rename and delete projects

1. From the web portal click on the 3 dots menu



2. Click on Edit my organization



3. Check the box beside Allow my admins to create, rename and delete projects on my behalf and click on **Confirm**

