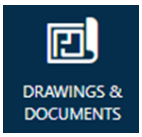
SmartUse Web Portal: Document and User Management

How to create a project

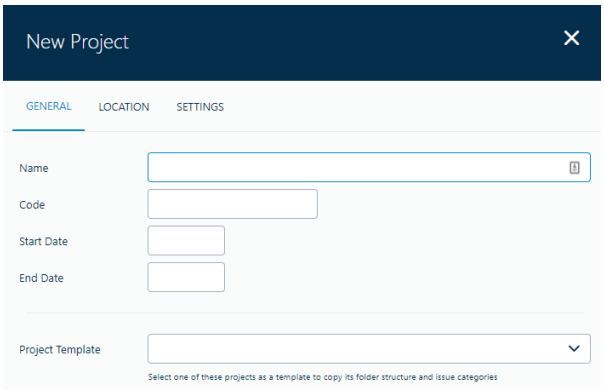
1. Access SmartUse Web Portal

2. Access the **Drawings and Documents** section

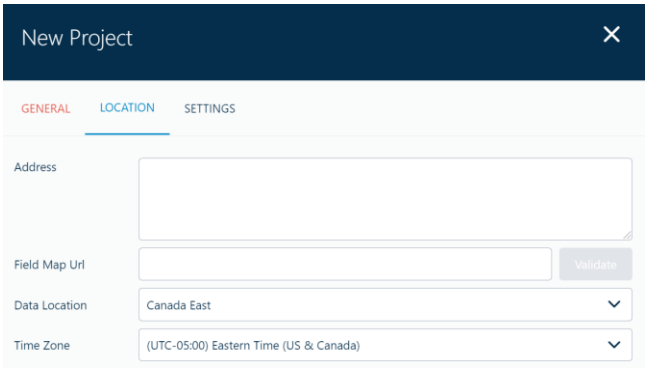


3. Click on the  located in the upper right corner of the page.

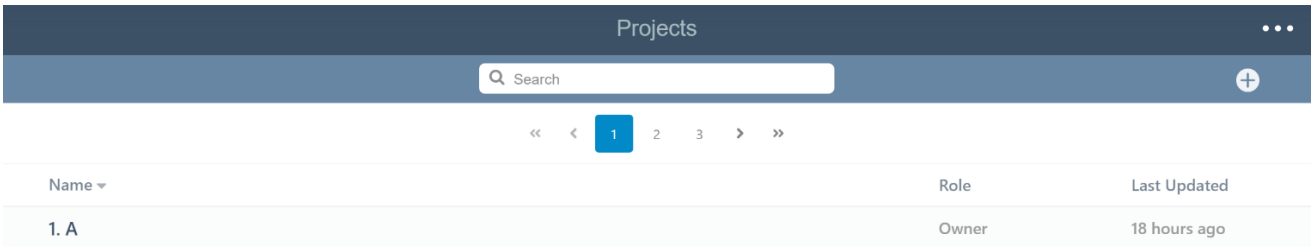
4. Enter the name of the project. You can select **to copy the folder structure, issue categories from an existing project** or leave it empty to create a new folder structure.



5. You will also have the option to select the storage location for your project, a location will be selected by default but can be changed if needed. Next, click Create project at the bottom of the window.

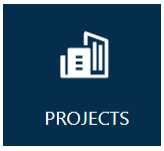


6. You will then see your available projects displayed

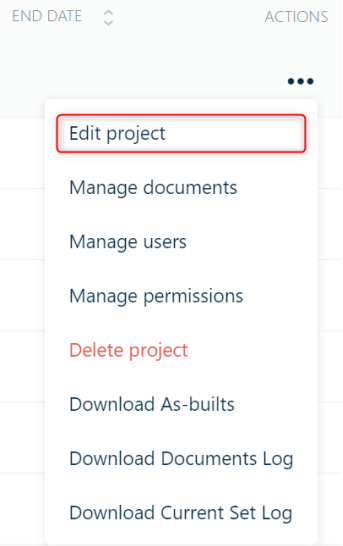


How to rename a project

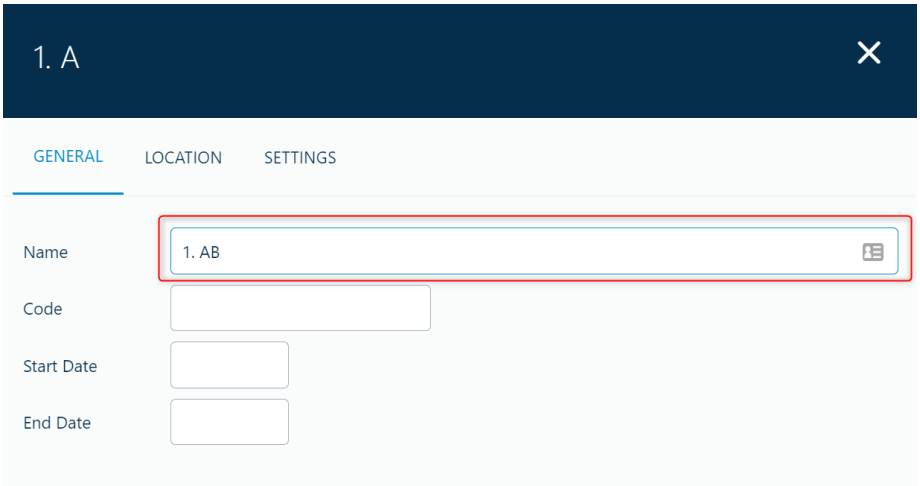
1. Select the project you wish to modify in the **Projects** section



2. At the far right, click the 3 dots and select **Edit**



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

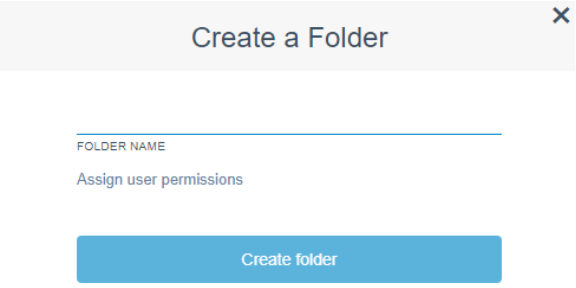


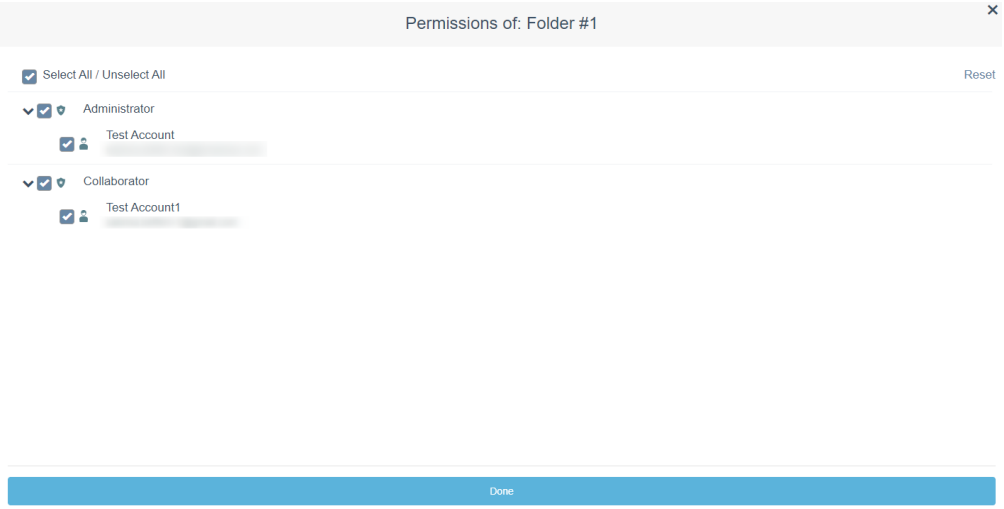
How to create a folder

1. In the **Drawings & Documents** section, click on the project where you wish to create the folder in

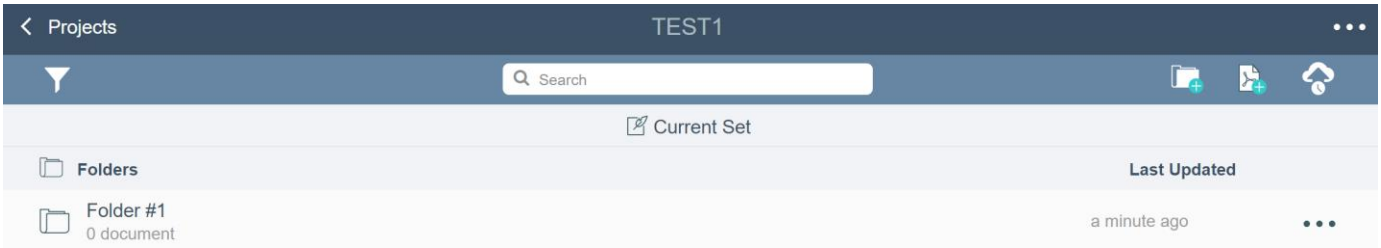
2. Click on the folder creation button located in the upper right corner of the page

3. Enter the name of the folder and assign user permissions for this folder if necessary. When done, click **Create folder**





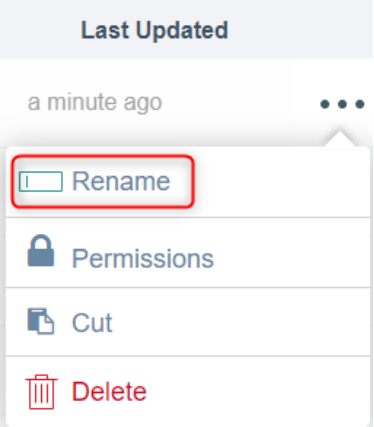
4. Your new folder will then be displayed. Repeat steps 2 to 3 to create as many folders as required. You can also repeat those steps within a folder to create new sub-folders.



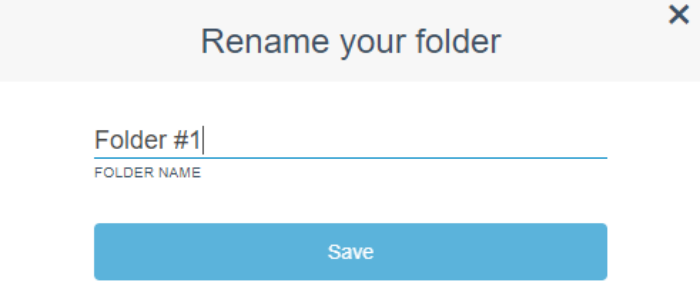
How to rename a folder

1. Select the project and then folder you wish to rename

2. At the far right, click the 3 dots and select Rename

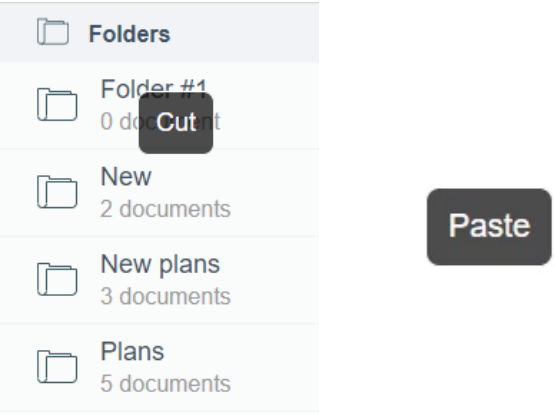


3. Rename your folder as necessary and click **Save**



How to cut and paste a folder in the same project

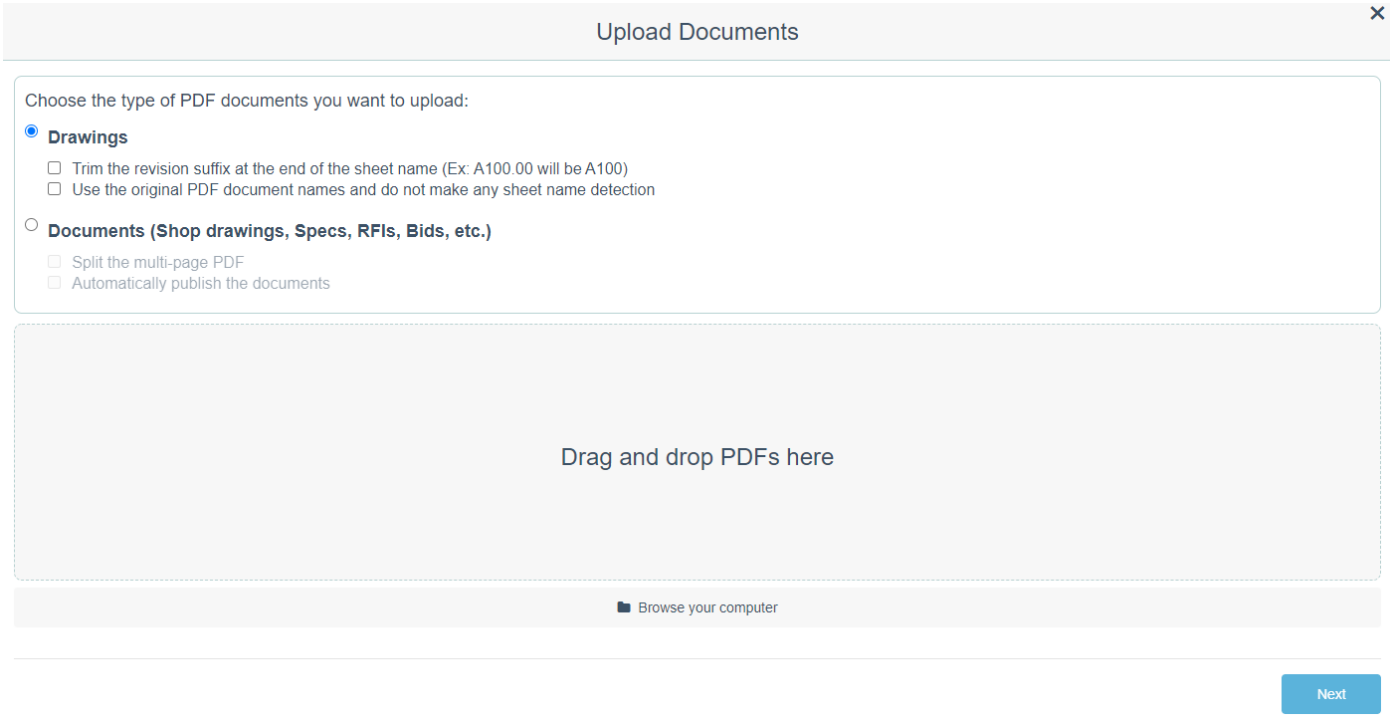
1. Right-click on the folder to cut and do the same to paste it in the desired location of the same project.



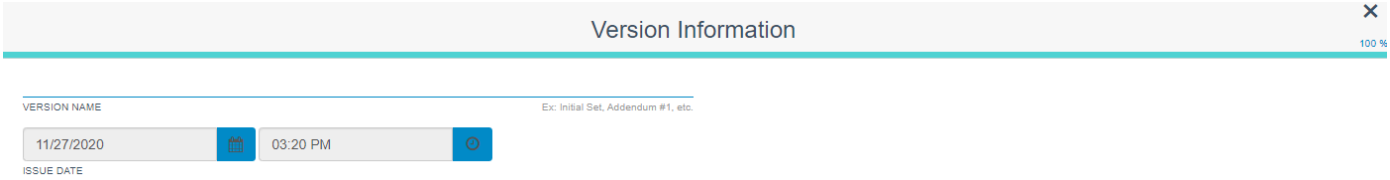
How to upload documents

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

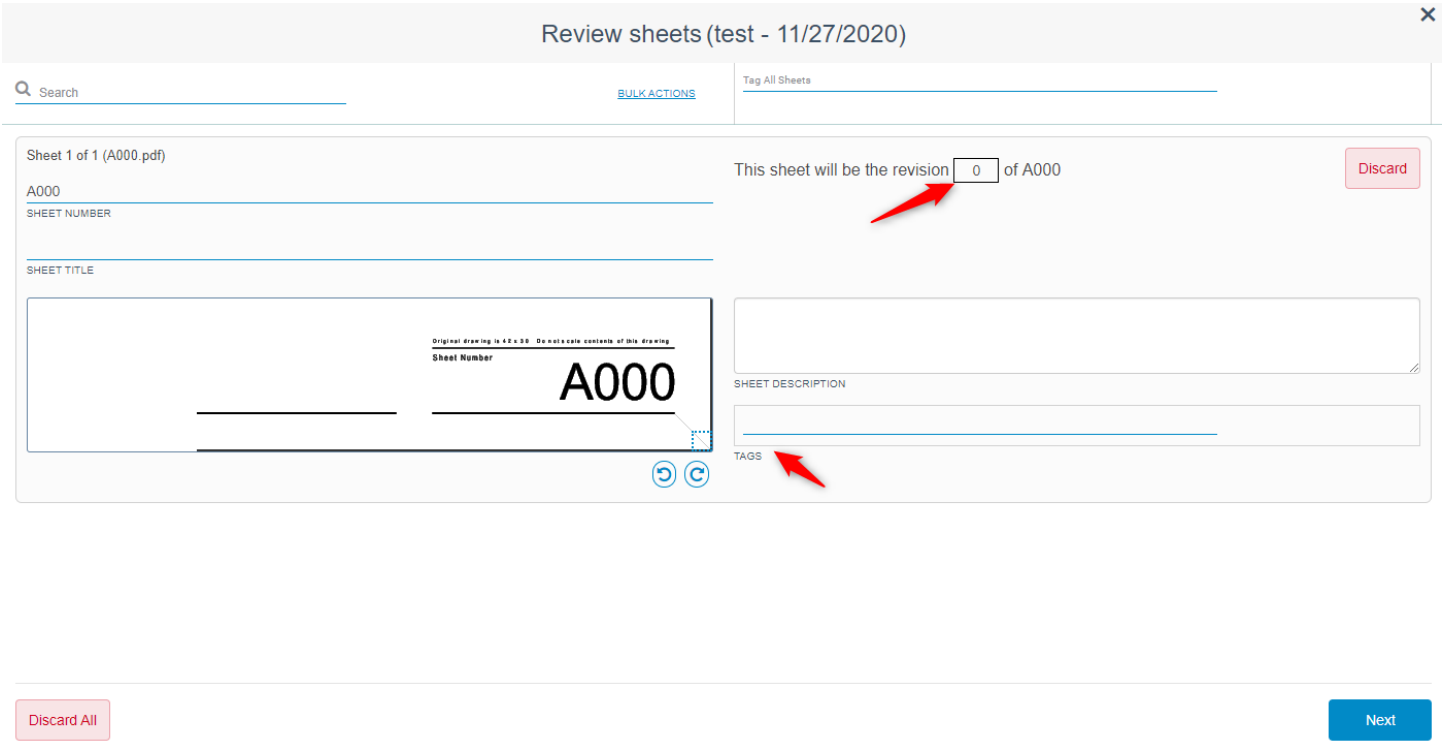
2. You will then have the option to upload drawings or documents, once all your documents have been dragged and dropped, click Next



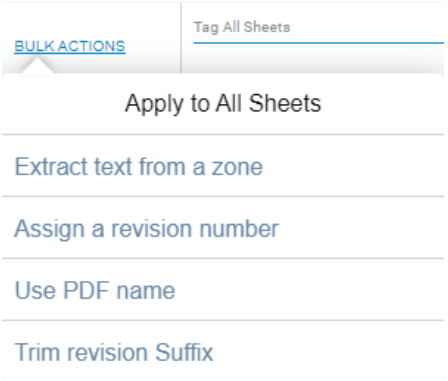
3. Enter the version information



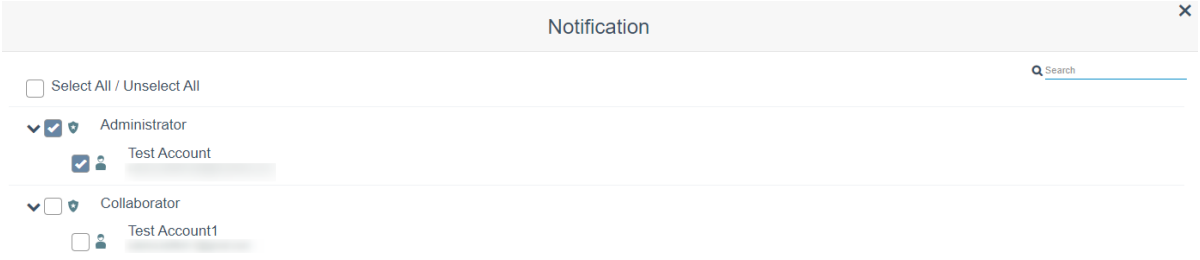
4. Enter revision information, as well as a description or any tags if necessary



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



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

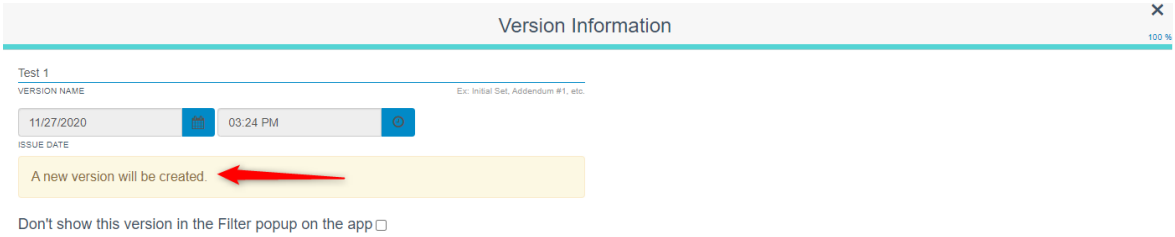


How to upload revisions

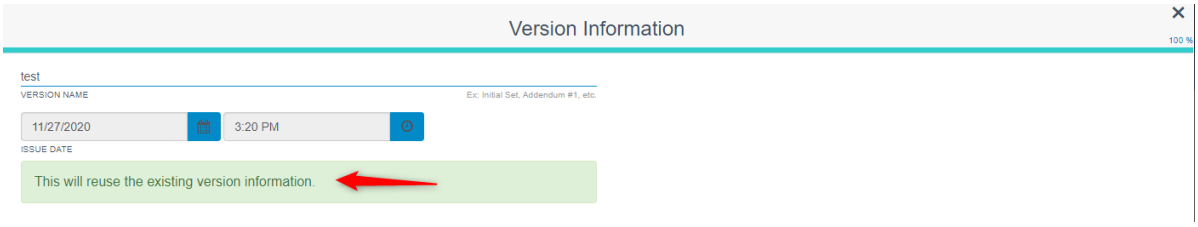
1. Access the project and click to upload your documents in the correct folder

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

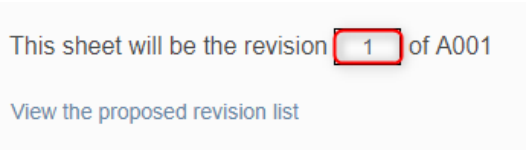
3. If you must use the same version to upload your revised documents, it is recommended to either change the date or the time by one minute. This will ensure that **a new version will be created,** and the old version won't be overridden



If the same version is used and none of the date or time information is modified, you will see the message in green that this will reuse the existing version information therefore overwriting the current version



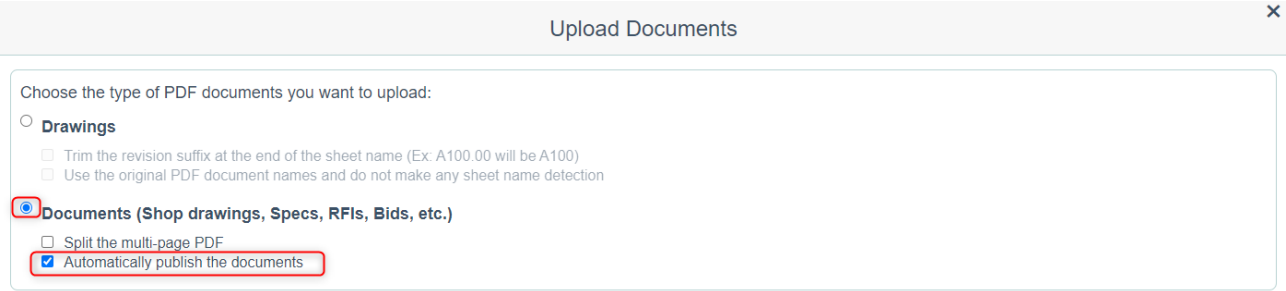
4. Once the version information is correct, in the next screen you will be able to use the batch options to detect your sheet titles and numbers as well as ensure that the revision number is correct. **Revisions are automatically incremented based on the previous revision number, if you need to modify the revision number you may do so at this step.**



How to automatically publish documents

1. Click to upload documents

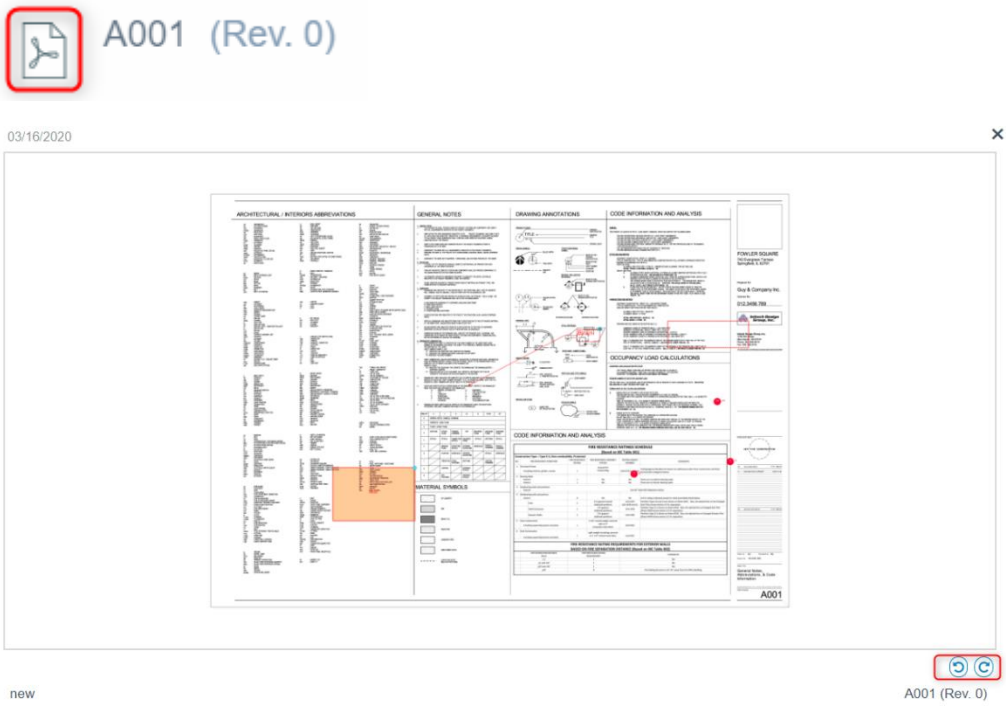
2. Select documents and click to check Automatically Publish Documents



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

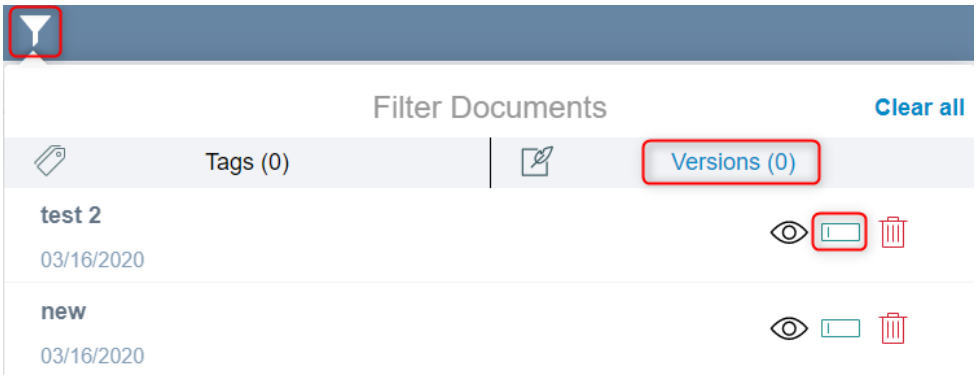
How to rotate a document

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

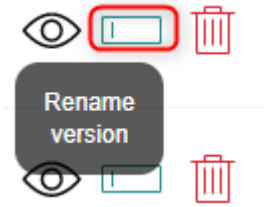


How to change the version name

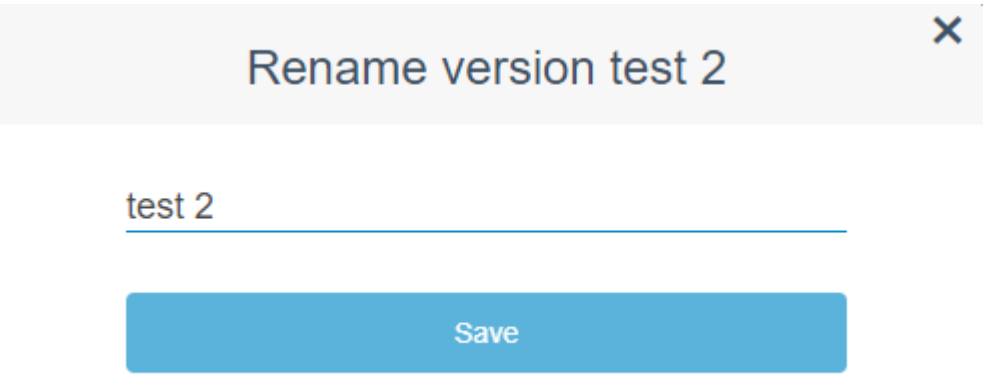
1. Within the desired project, click on the filter and select **Versions**



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



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



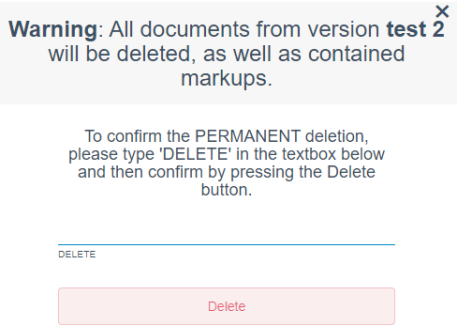
How to delete a version of documents

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

4. Write **DELETE** to confirm

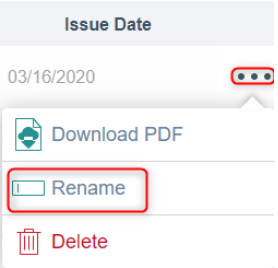


5. Click on the **Delete** button

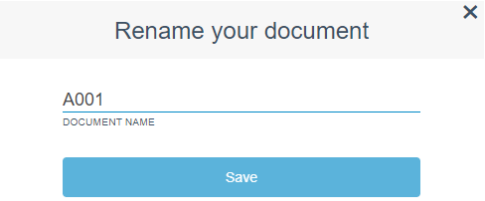
How to modify a document name

1. Select the project and then document you wish to rename

2. At the far right, click the 3 dots and select **Rename**



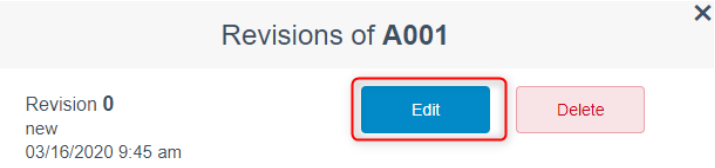
3. Rename your document as necessary and click **Save**



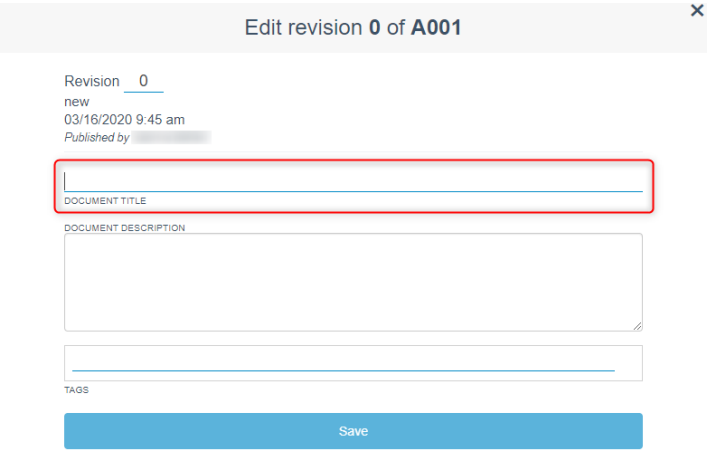
How to modify the document title

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

3. Click on **Edit**



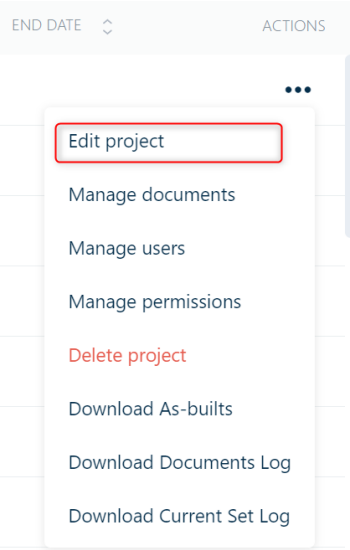
4. A screen will then open allowing you to modify the document title



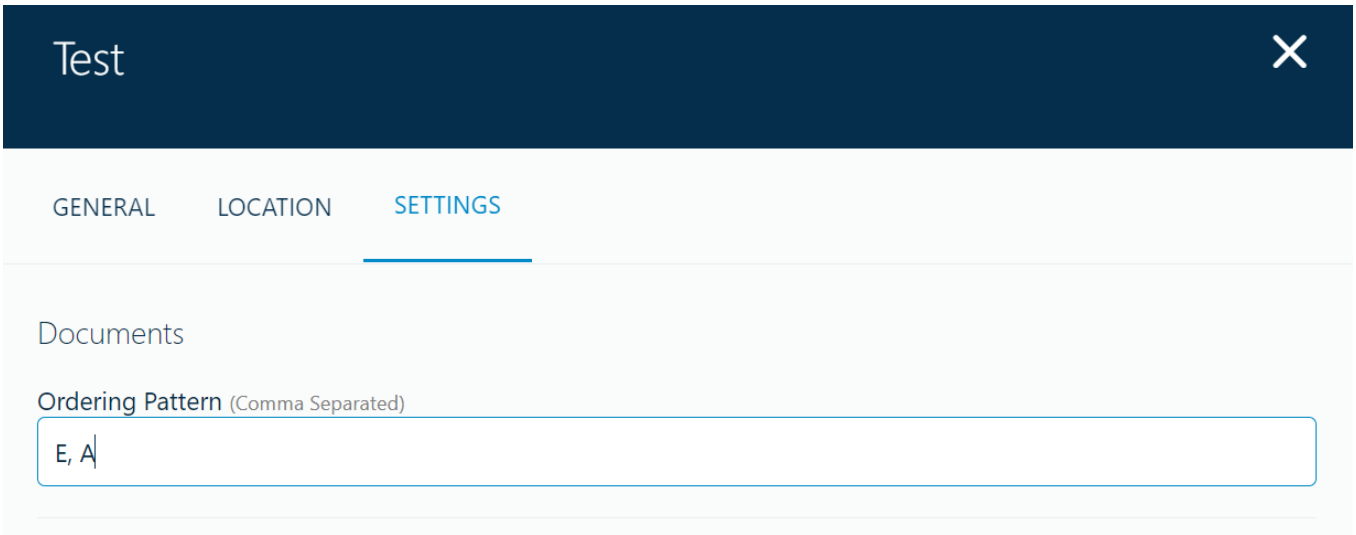
5. Click **Save** once done

How to choose custom document ordering patterns

1. In the **Projects** section, click on 3 dots beside your project and then on **Edit**



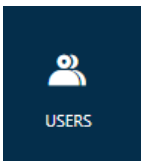
2. You then have an option to enter document ordering patterns. (Example: Documents that start with E come before documents that start with A). **Note that this option is only available for owner's unless they have given access to co-owners to modify on their behalf.**



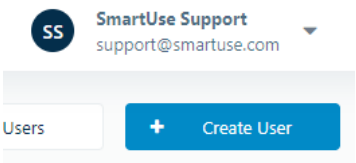
How to add a user

1. Access SmartUse Web Portal

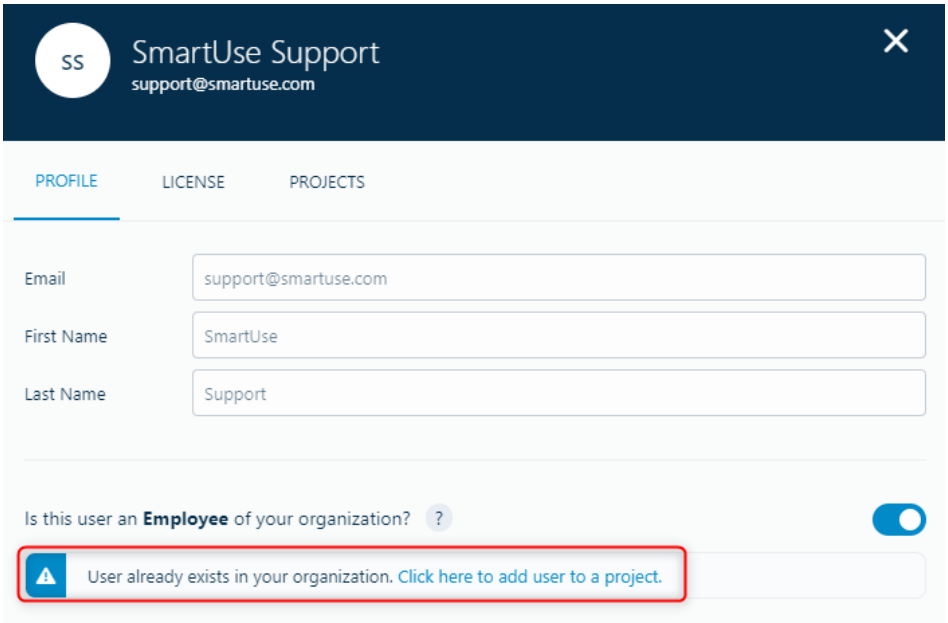
2. On the left-hand side, click on **Users**



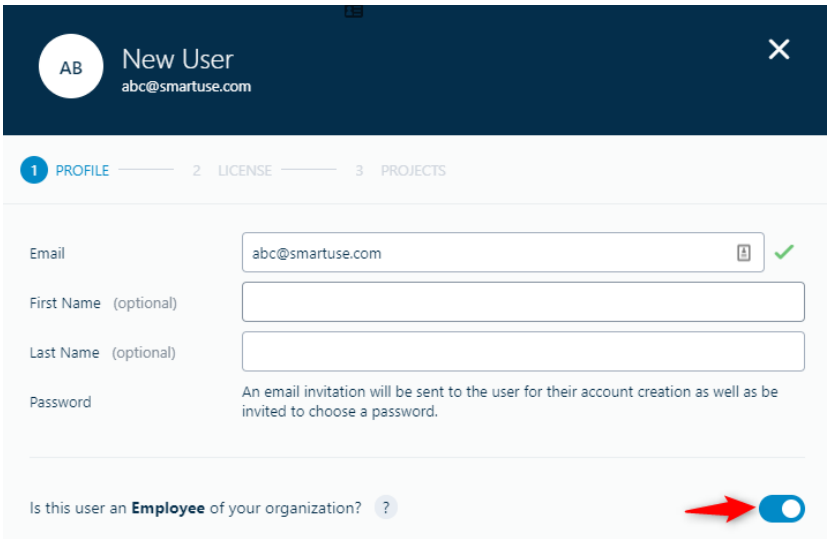
3. In the top right you will have an option **Create User**



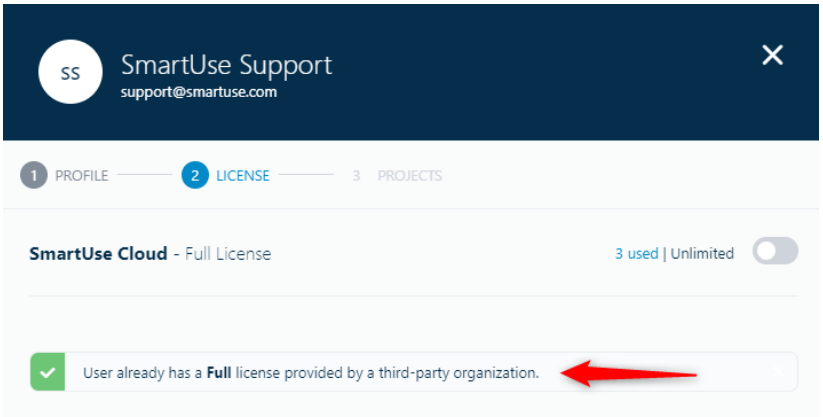
4. To start, you will need to enter **the users email address** and click on **Next**. If the user already exists in your organization, click the link to go directly to the projects screen to assign them a role in a project. If the user does not already exist, continue onto step 5.



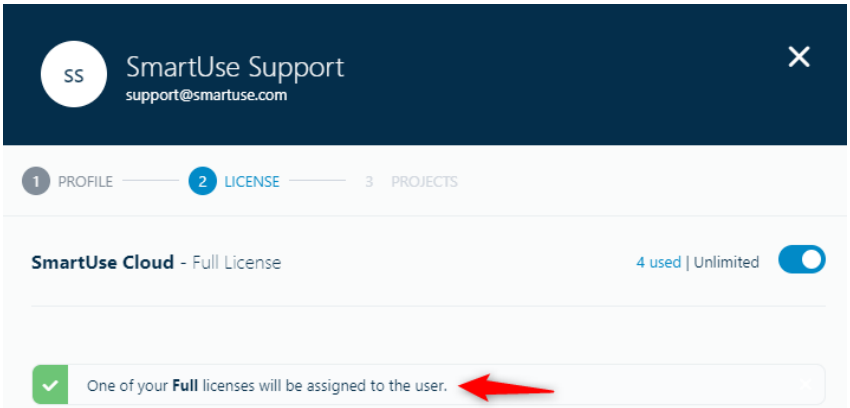
5.The first and last name fields are optional as the user will be invited to enter them when creating their account. If this employee is part of your organization, slide the toggle to on. Click **Next.**



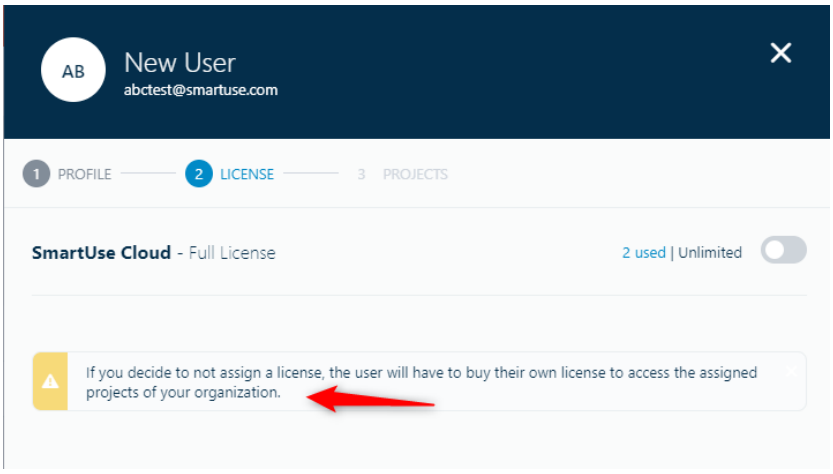
6. Under **Licenses**, if the user already has their own license the message will appear below. In this case, you will not need to assign them one of your licenses.



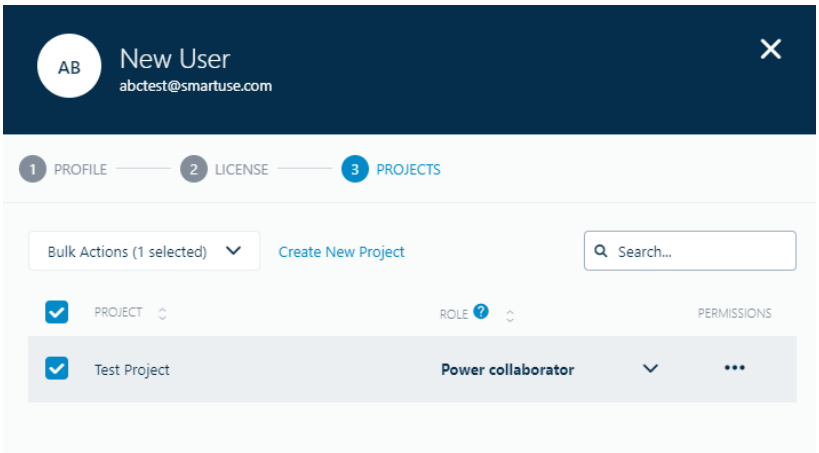
If the user does not have their own licenses, you can assign them one by using the toggle switch.

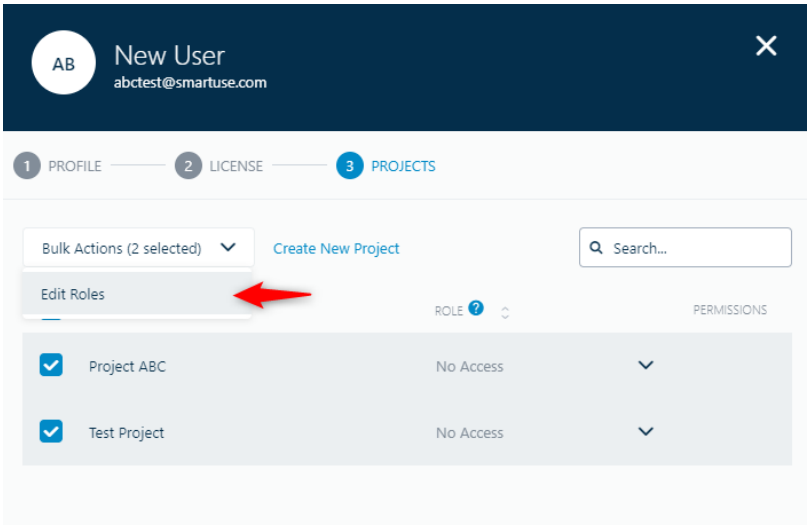


If the user does not have their own license and no license is assigned, this user will have to buy his own license.



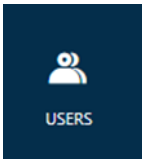
6. Under **Projects**, select the projects and roles for this user. Folder permissions can be done by clicking the 3 dots on the far right. A bulk assign can also be done by selecting the necessary projects and from the drop-down menu and clicking **Edit Roles**. Once done, click **Add User**



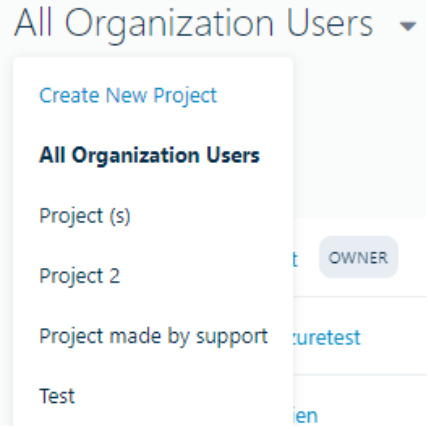


How to bulk assign users to a project

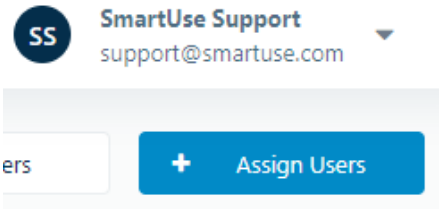
1. Access the **Users** section on the left side of the portal



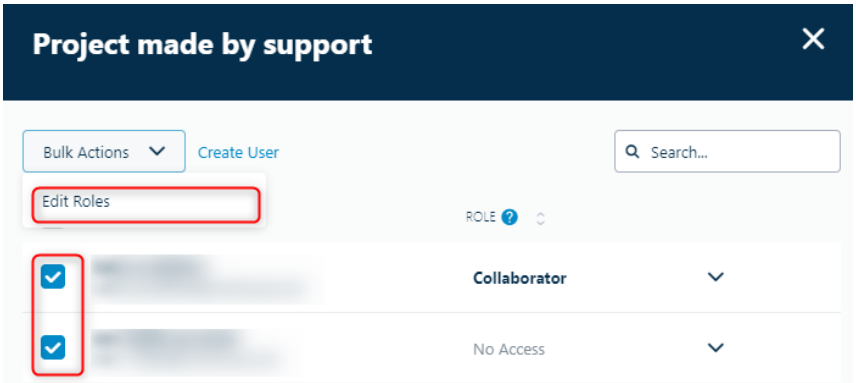
2. In the drop-down menu select the project that you wish to add users to



3. Once in the project, click on **Assign Users**



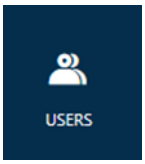
4. Select the users you wish to add to this project from the list and assign them a role



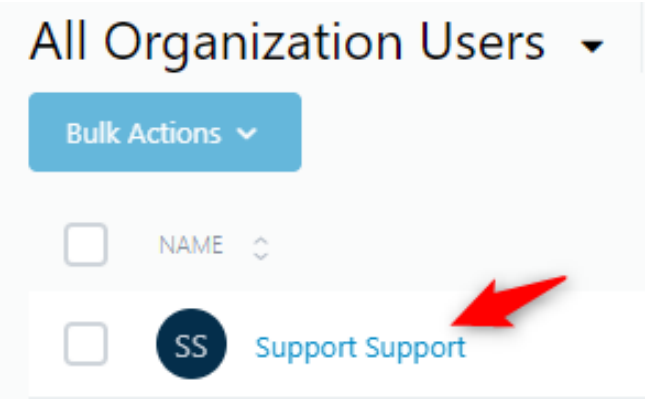
5. Once done, click on **Update** at the bottom of the screen

How to assign folder permissions

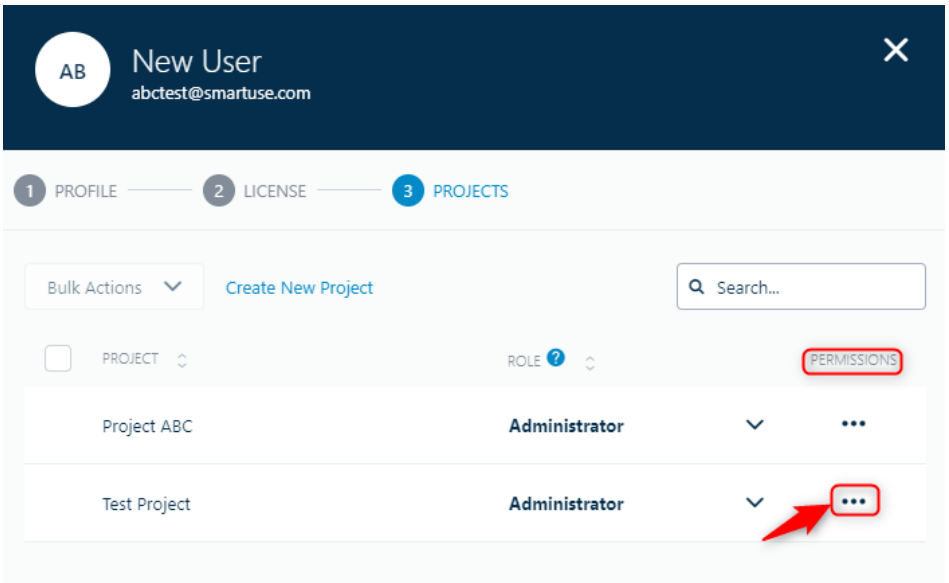
1. Access the **Users** section on the left side of the portal



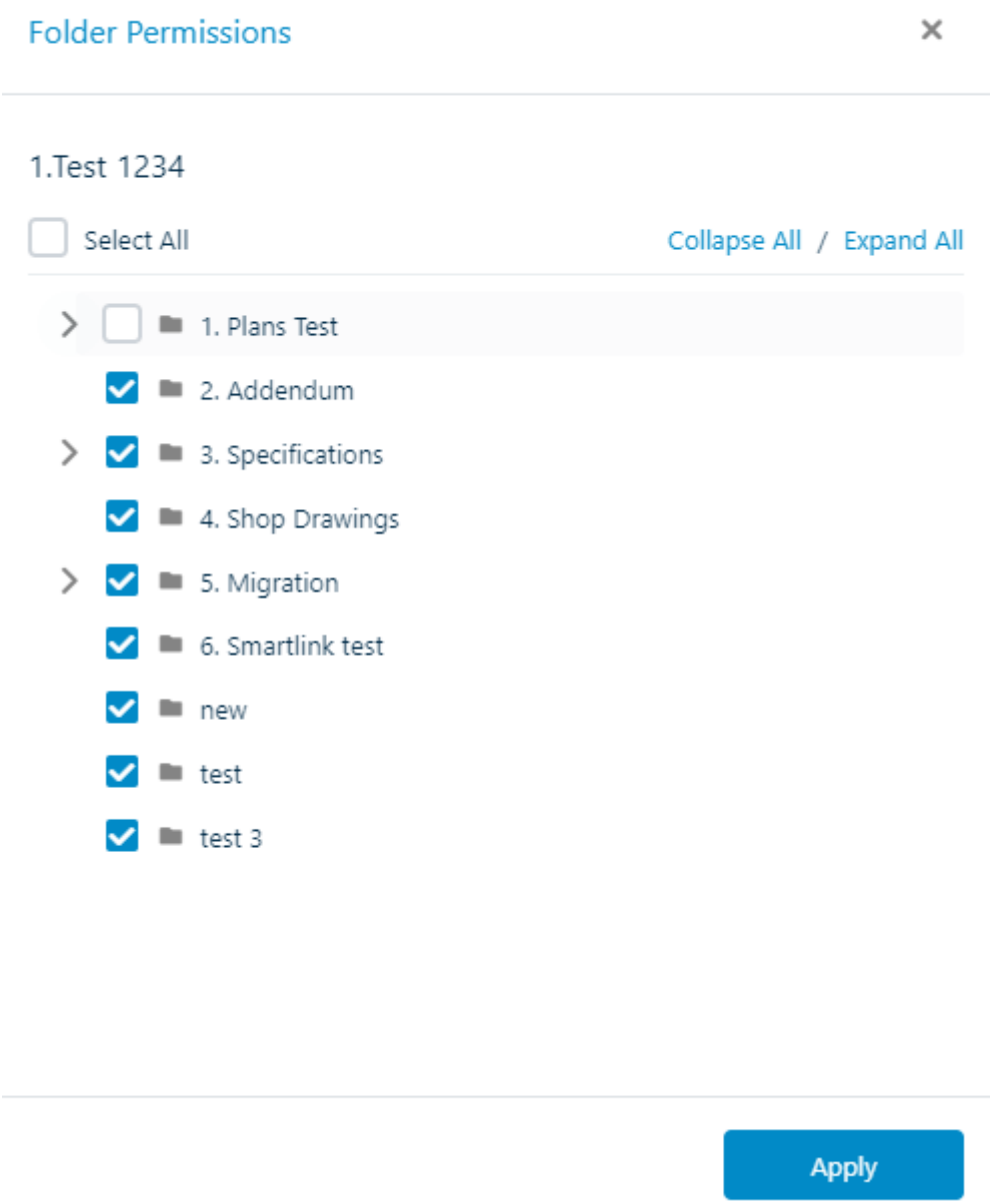
2. Under **All Organization Users** or the project itself, click on the users' name



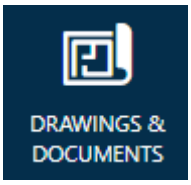
3. Access the **Projects** tab, any project the user has access to will appear in the list with their role and the 3 dots under permissions:



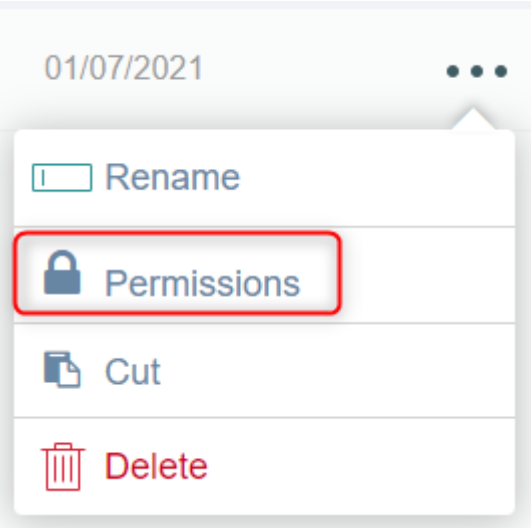
4. The checkboxes identify what folders this user has access to. To remove access simply click to remove the checkbox. When changing permissions of folders that have sub folders, the subfolders are selected by default.



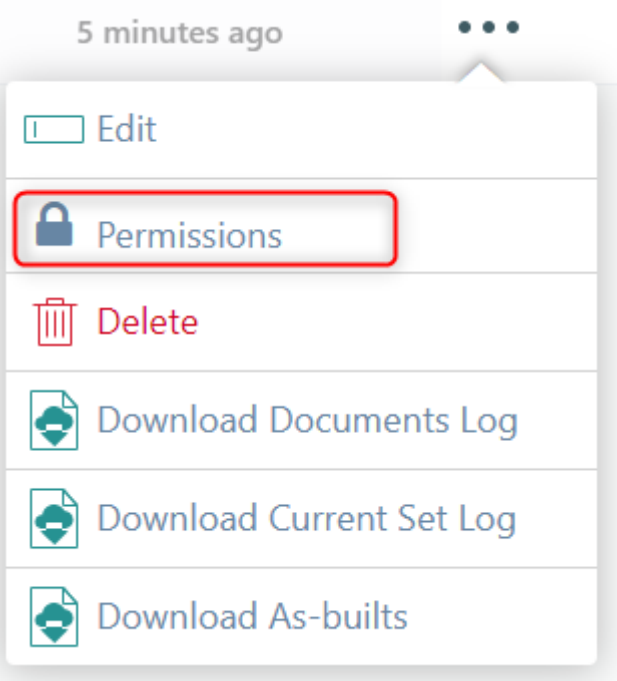
5. The folder permissions can also be modified in the project by accessing the **Drawings & Documents** section



6. Once in the project, use the 3 dots at the far right of the folder itself:

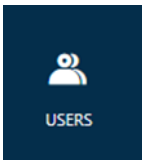


6. For documents located at the root of the project, the permissions can be modified on the main login screen by using the 3 dots at the far right of the project name:

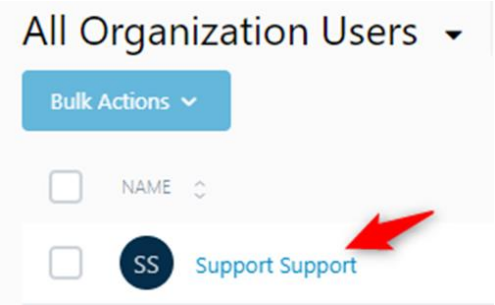


How to remove users

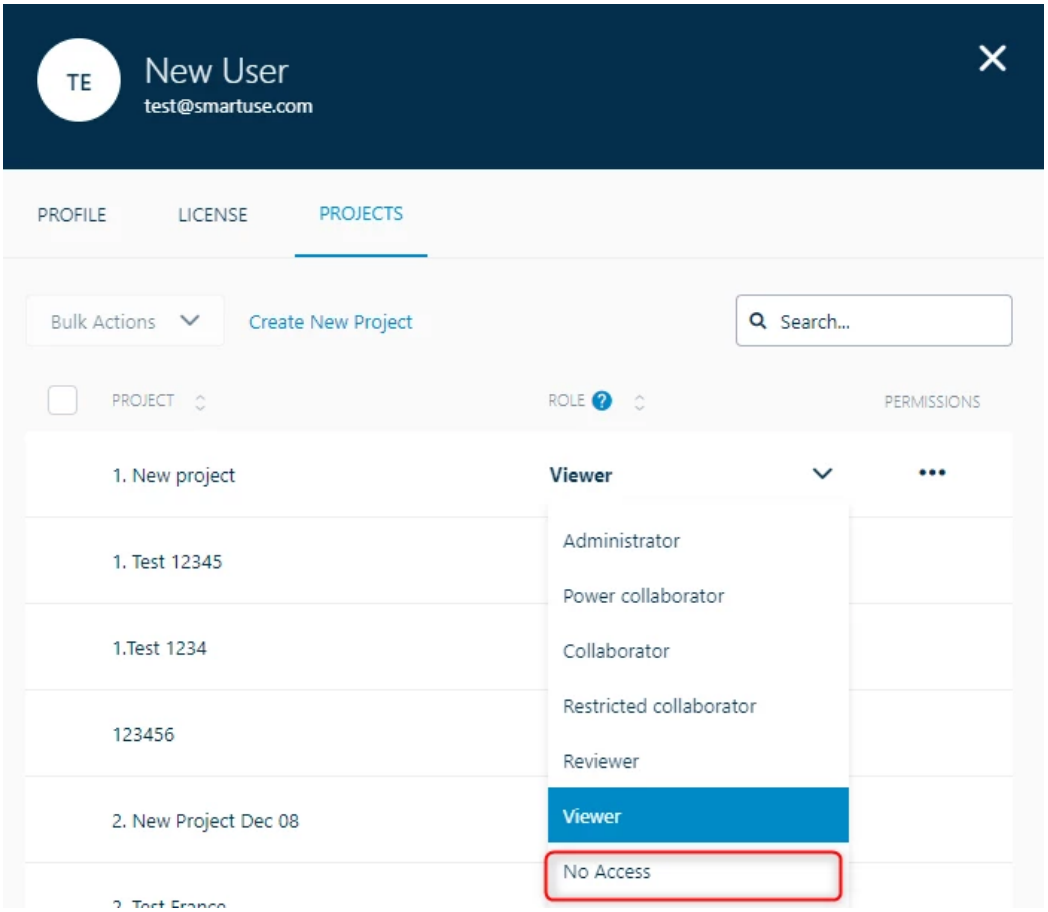
1. On the left-hand side, click on **Users**



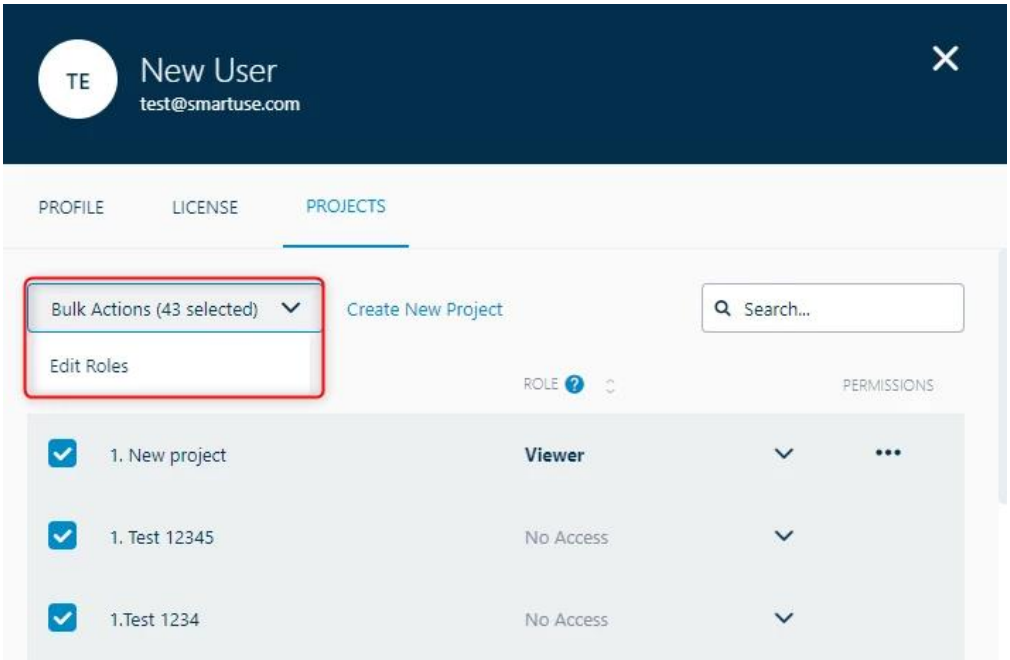
2. Under **All Organization Users** or under the project itself select the user you wish to remove



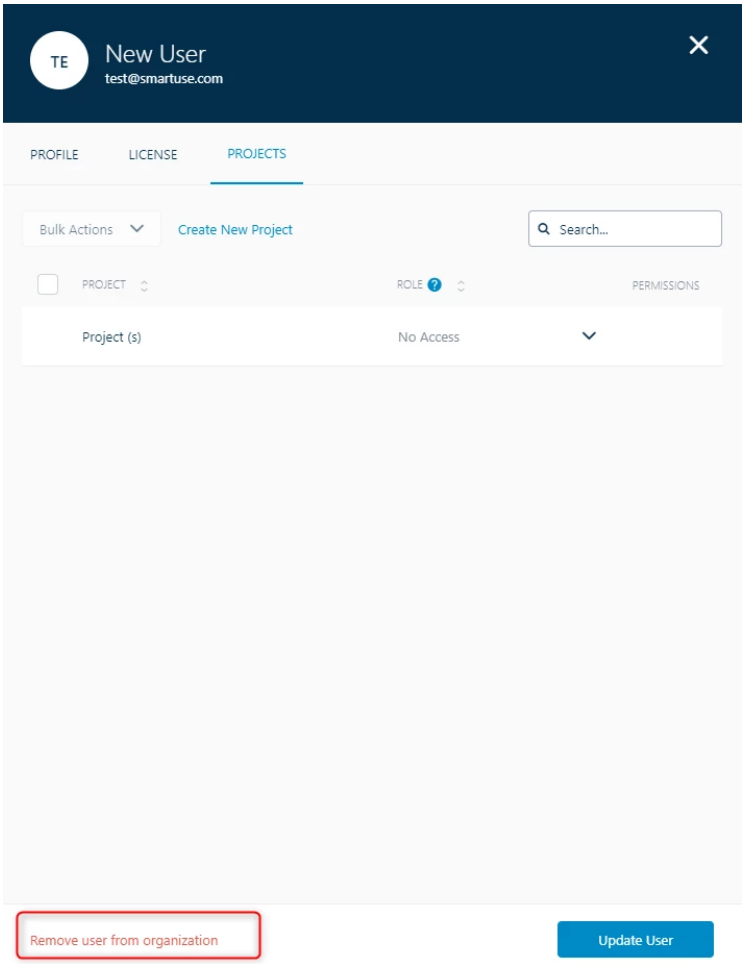
3. To remove them from a project, click their role beside the desired project and select **No Access**



This can also be done for multiple projects by using the bulk actions

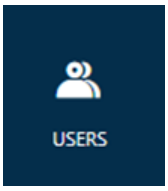


4. **Removing a user completely from the organization can only be done by the owner or a co-owner of the organization**

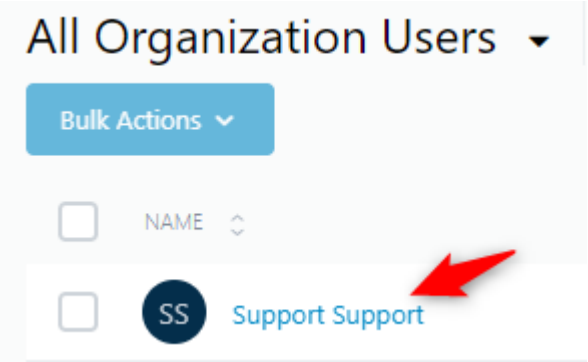


How to allow users to manage and create projects

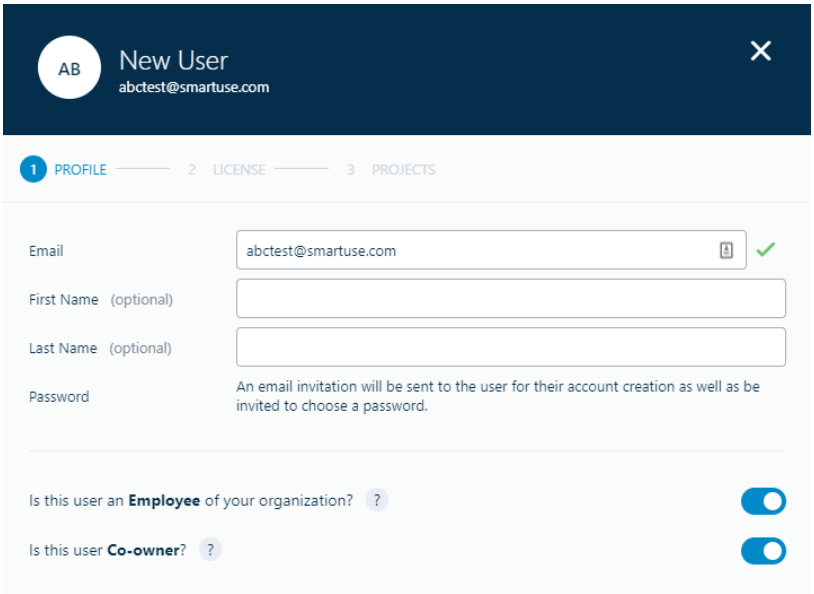
1. **Co-owners can only be modified by the owner of the organization.** From the web portal click on **Users**



2. Under **All Organization Users** or the project itself, click on the users' name

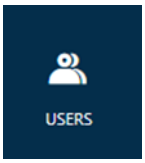


3. Slide the toggle for **Co-owner** to ON, then click **Update User** at the bottom of the page to confirm. **The user can now manage and create new projects but will only have access to existing ones where they are an administrator.**

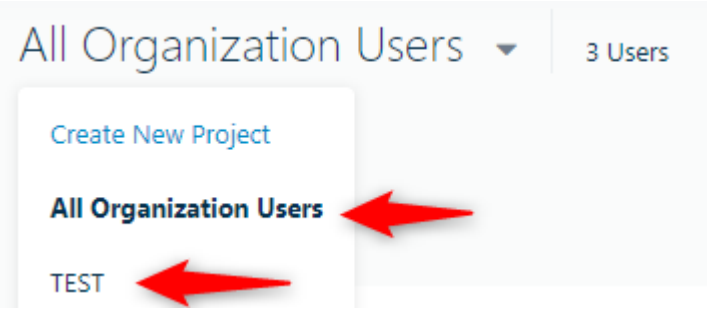


How to export the list of users

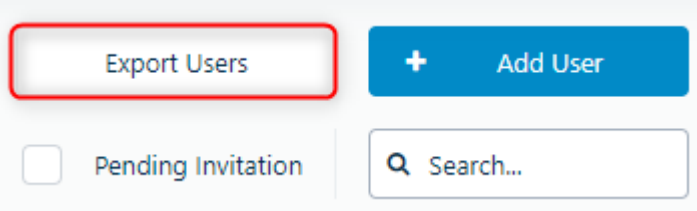
1. Access the **Users** section on the left side of the portal



2. Choose **All Organization Users** to get all user of your organization or choose an individual project



3. In the top right, click on **Export Users**

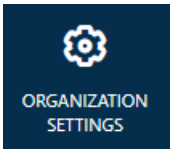


4. A excel file with the selected users will then download

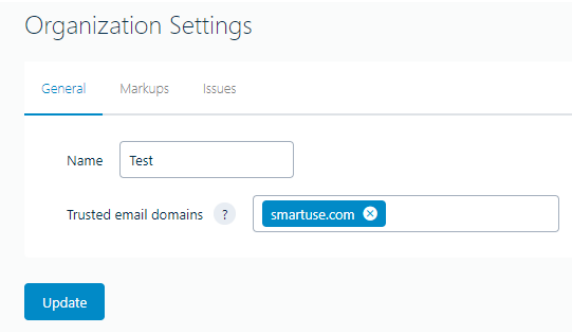
Last Name	First Name	Email	License Type	Pending Invitation
[illegible]	[illegible]	[illegible]	Trial	
[illegible]	[illegible]	[illegible]	None	
[illegible]	[illegible]	[illegible]	External Full	

How to modify organization settings

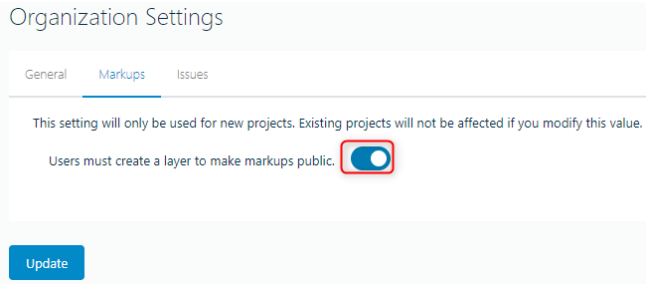
1. Access the Organization settings on the left-hand side of the portal **(accessible only by owners and co-owners)**



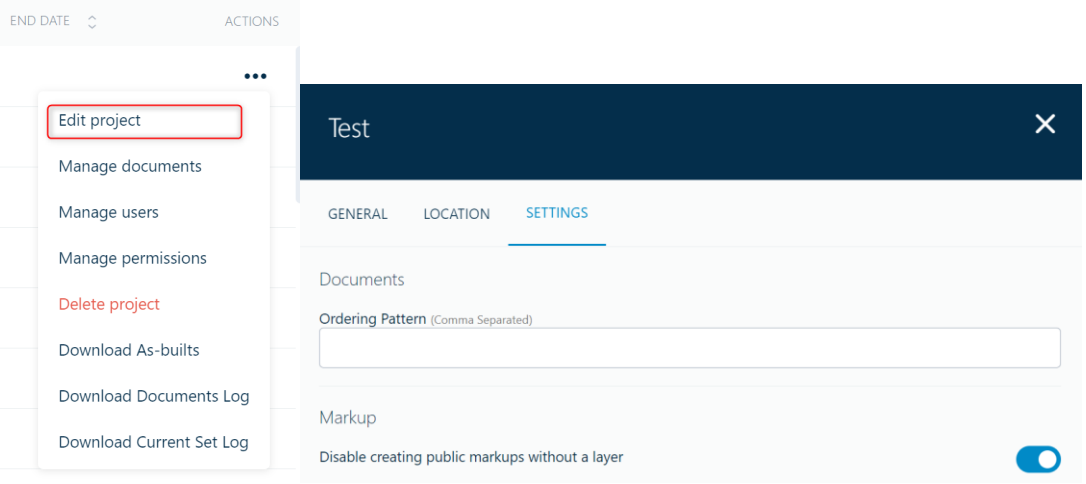
2. In **General**, you can change the name of your organization and add trusted email domains



3. In **Markups**, you have the option to force a user to create/ add markups to a layer to make them public



This option is also available at the project level by clicking on the 3 dots to the far right of the project name in the **Projects** menu



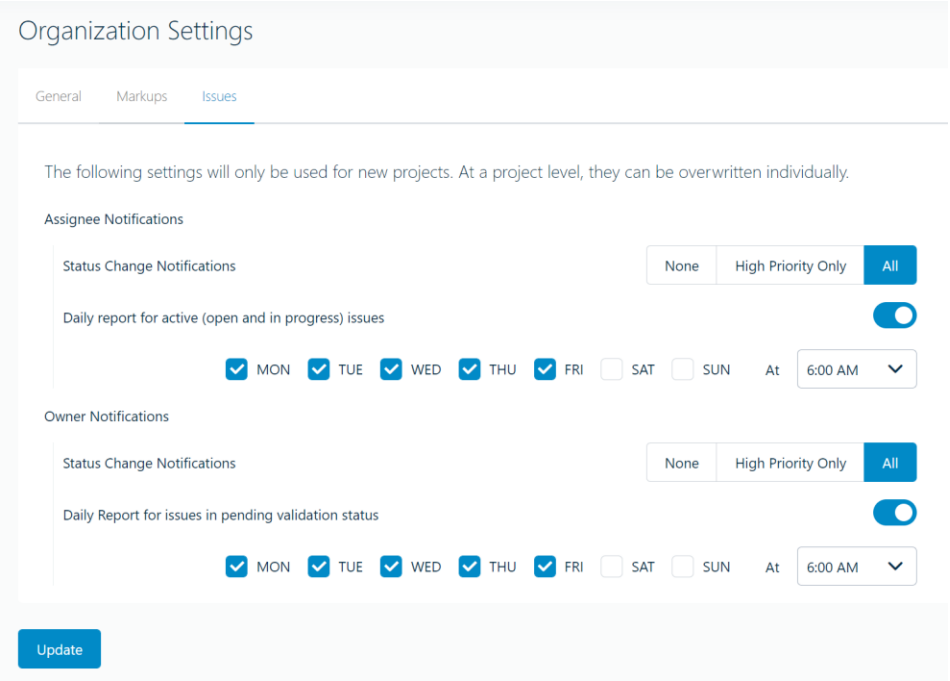
4. In **Issues**, you have the following options:

Assignee notifications:

- Send a daily summary report for active issues
- Get notifications on all changes for all issues
- Get a notification only for high priority issues

Owner notifications:

- Send a daily summary report for issues pending validation
- Get notifications on all changes for all issues
- Get a notification only for high priority issues



These options are also available at the project level by clicking on the 3 dots to the far right of the project name