




SmartUse Web Portal: Document Management

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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, issue categories and lists from an existing project** from the drop-down menu or leave it empty to create a new folder structure. 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.

Create Project ×

PROJECT NAME

--- Empty project ---

COPY FOLDER STRUCTURE, ISSUE CATEGORIES AND LISTS FROM PROJECT..

Canada East

CHOOSE DATA LOCATION...

Create Project

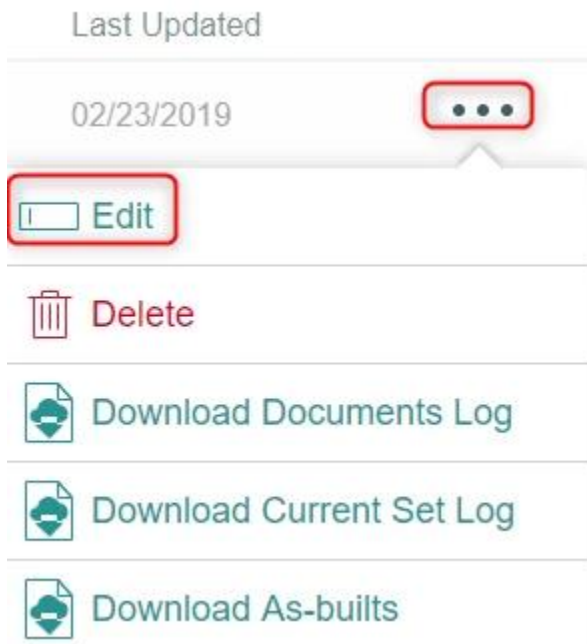
4. You will then see your available projects displayed

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**

The screenshot shows a dialog box titled 'Edit your project' with a close button (X) in the top right corner. The dialog contains the following fields:

- Test Project** (PROJECT NAME)
- (UTC-05:00) Eastern Time (US & Canada)** (TIME ZONE)
- DOCUMENT ORDERING PATTERNS, COMMA-SEPARATED

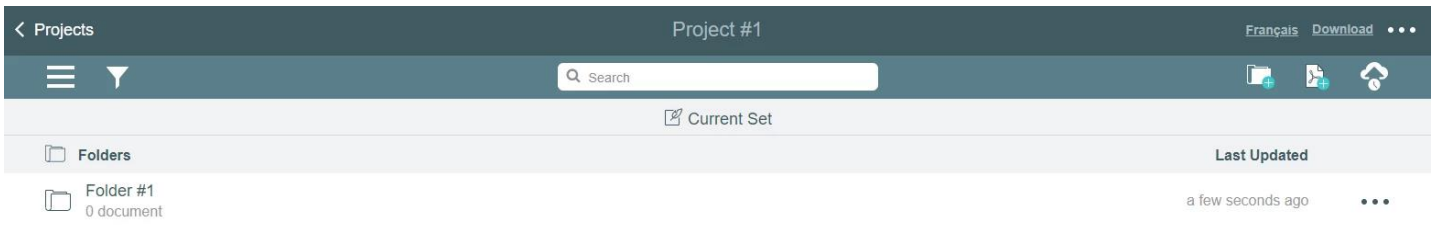
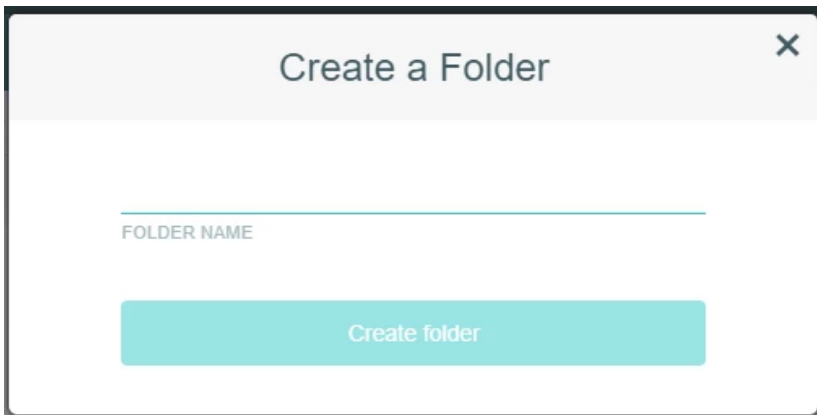
A teal 'Save' button is located at the bottom of the dialog.

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



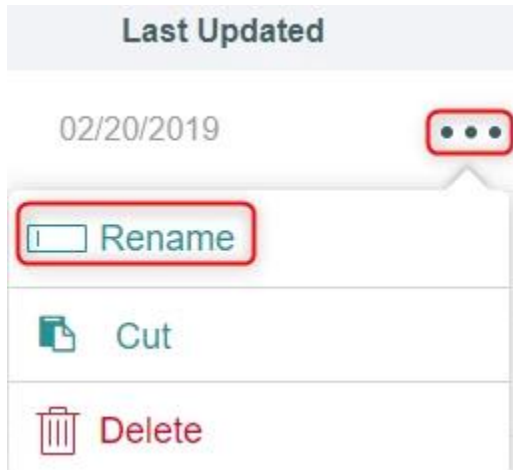
3. Enter the name of the folder and click "Create folder" on the following window. You will then see you new folder available displayed



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

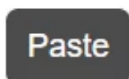
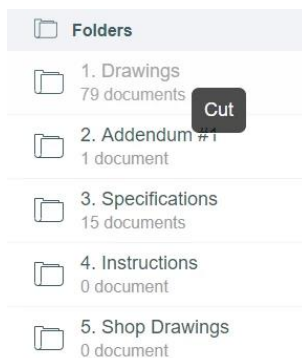


3. Rename your folder as necessary and click **Save**



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

Browse your computer

Next

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 (Test - 02/10/2020) ×

Search BULK ACTIONS Tag All Sheets

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

A101 View the proposed revision list

SHEET NUMBER

SHEET TITLE

SHEET DESCRIPTION

TAGS

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


BULK ACTIONS



- Apply to All Sheets
- Extract text from a zone
- Assign a revision number
- 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

Notification

Select All / Unselect All

 Administrator

-  Jean-François Drouin
-  Jeff Drouin

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

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

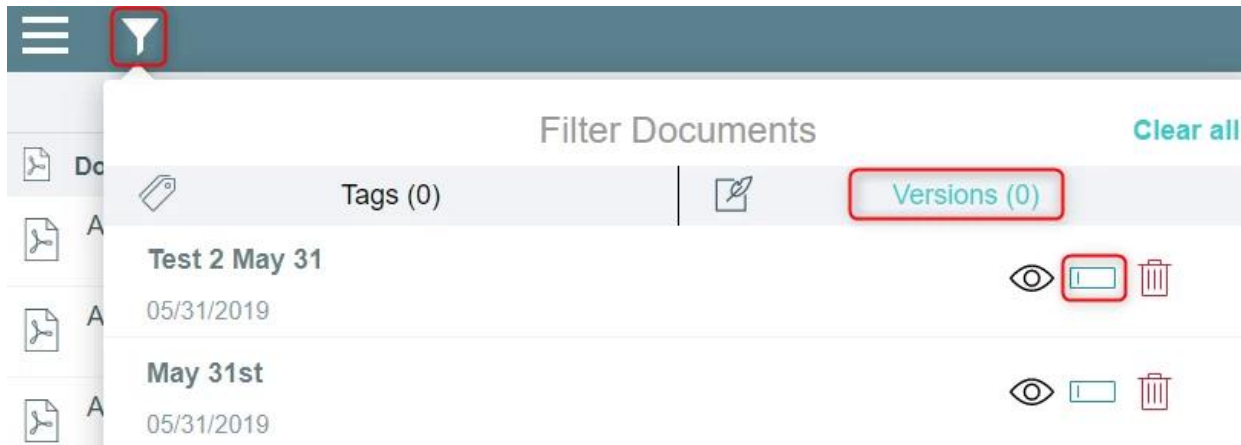
How to rotate a document

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.

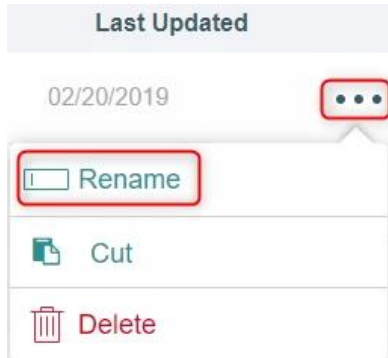
DELETE

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. 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

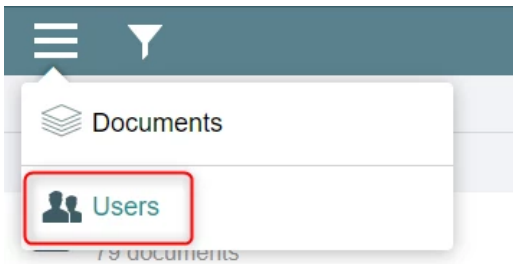
How to add users

1. Access [SmartUse Web Portal](#)

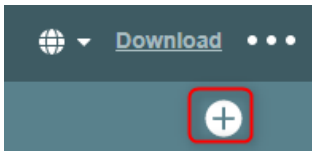
2. Select the project you want to manage and click on the menu located in the upper left corner of the page



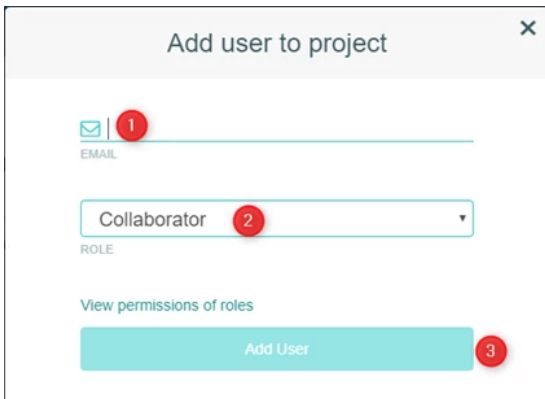
3. Select **Users**



4. Click the + in the top right corner to add users



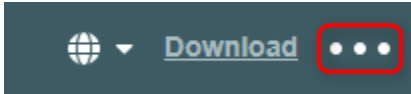
5. Enter their company email (1) or select from the drop-down list of current users and select their role from the drop-down menu (2) once finished, confirm by clicking **Add User**

A screenshot of the 'Add user to project' form. The form has a title bar with 'Add user to project' and a close button (X). Below the title bar, there is an email input field with a red circle containing the number '1' next to it. Below the email field, there is a role dropdown menu with 'Collaborator' selected and a red circle containing the number '2' next to it. Below the role dropdown, there is a link that says 'View permissions of roles'. At the bottom of the form, there is a teal button with the text 'Add User' and a red circle containing the number '3' next to it.

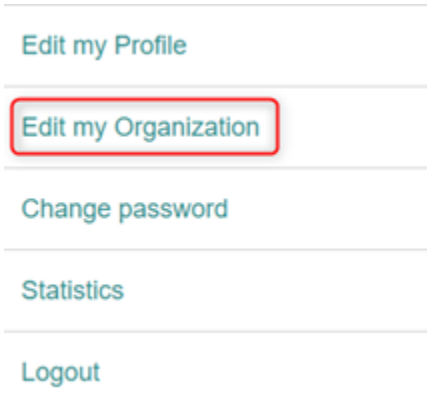
6. If you are unsure of the role you wish to assign, simply click [View permissions of roles](#) to view the matrix of roles and permissions

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**

