



e-Builder Documents Module

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About the Documents Module

An immense amount of data is generated throughout the life of a project, and the Documents module gives team members a central location to store, organize, and access the files they need. Folder permissions can be set to limit access to specific files. In this way, administrators control who is able to submit, edit, delete, and view the files in each folder. The folder structure can be arranged in any way that is best suited to support your internal processes. It gives all project participants, from the Project Executive to the Project Assistant, quick access to project files.

One of the key advantages of using the e-Builder Documents module is that all project members are able to access the most up-to-date files from any location, at any time. The Documents module makes it easy to share documents via email or through notifications. In support of the collaborative nature of capital program management, team members are able to work on files collectively, check files in and out of the system, and redline documents while maintaining document version control. When internal or external participants are uploading files into the system, they are required to specify a folder in the document structure, which ensures that all files within the system are stored in a central location.

For increased visibility, features such as document access history are available to Administrators. You can also restore deleted files, and users with the appropriate permissions can easily review and modify document custom fields. Whether in the planning, design, build, or operating phases of the project, the Documents module streamlines the exchange and sharing of information while reducing the effort, time and cost associated with this process.

Access Project Documents Page

There are two methods of accessing the Project Documents page. The first method is from the top navigation tabs, which should be used if you are not already in a project. However, if you are in another module within the same project, the best method of access is from the Project Menu, which will help you avoid having to reselect your project.

To access the Project Documents page for a specific project

1. Click the Documents tab located on the top navigation tabs.
2. Choose a project from the **All Projects** menu.

The Project Documents page is displayed.

To access the Project Documents page for the current project

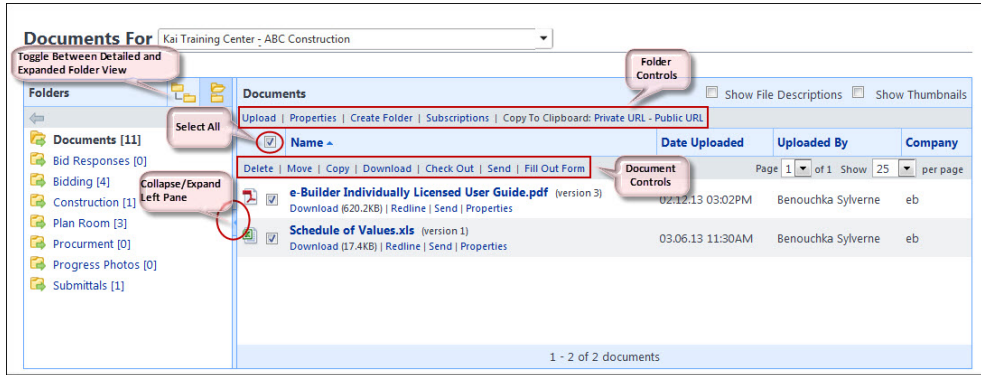
If you are already within a project, you can access the Documents module via the Project Menu located in the Left Navigation Pane.

- Click **Documents**.

The Project Documents page is displayed.

Documents Page Overview

The Documents page is central to working with documents. The folder structure is located in the left pane. When you select a folder, it display its contents in the adjacent content pane.







Documents controls

The controls located directly above the list of documents allow you to take action for one or more of the selected files.



- **Delete:** Deletes the selected files.
- **Move:** Moves the selected files to a different folder or project. For instructions, see Move Documents.
- **Copy:** Copies the selected files to a different folder. For instructions, see Copy Document.
- **Download:** Downloads the selected documents. If more than one file is selected, it zips the files for download.
- **Check Out:** Checks out the selected files. For instructions, see Check Out Files.
- **Send:** Sends the file via email or notifies an internal user of the document. For instructions, see Send Files.
- **Fill Out Form:** Fills out a form with the selected files attached. For more information, see the Fill Out Form window.
- **Compare:** Compares two selected files. The document compare feature allows you to identify the changes that have been made to a file. You can view files in different ways to best suit your needs. Overlays with difference detectors, side-by-side views, and highlighting the additions and deletions are all options that are available to you. For instructions, see Compare Documents.

Individual document actions

Documents \ Construction		Show File De
Upload Properties Create Folder Subscriptions Copy To Clipboard: Private URL - Public URL - Email Addr		
Name	Date Uploaded	
Delete Move Copy Download Check Out Send Fill Out Form Compare		Page 1
 Schedule of Values.xls (version 2) Checked out by Benouchka Sylverne Download (17.4KB) Redline Compare With Send Properties Edit	04.08.13 01:55PM	
 Presidential Towers - First Floor - Ceramic Tile.xlsx (version 1) Download (8.3KB) Redline Compare With Send Properties Edit	05.14.13 03:28PM	
 e-Builder Insurance Policy.docx (version 1) Download (70.6KB) Redline Compare With Send Properties Edit	08.08.13 05:55PM	
 Individual Document Controls		
1 - 3 of 3 documents		

- **Filename:** Click on the filename to view it in a document viewer.

Document Viewer - Supported File Types

The following file types can be viewed in the document viewer:

- doc
- docm
- docx
- eps
- msg
- mpp
- nwd
- ppt
- pptx
- rtf
- tif
- tiff
- txt
- vsd
- xls > 15 MB (Convert large files to .xlsx)
- xlsb
- xlsm
- xlsx

Note:

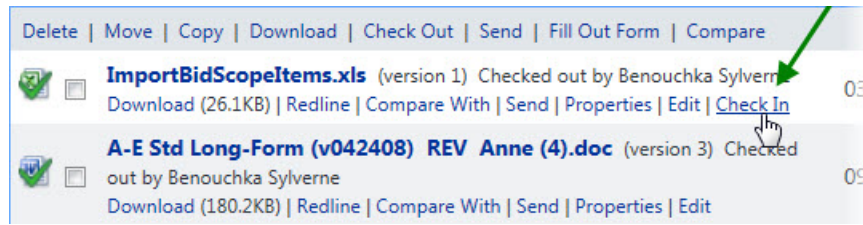
- To view file types that cannot be viewed in the document viewer, you must first download it and view it with its native application.
 - A filename that is greyed out indicates that it is being processed to be viewed in the document viewer. Large files may take some time to process.
 - A greyed out filename may also indicate that the file is not able to be processed for viewing due to unsupported file type or overly large file size.
 - Files that cannot be viewed (greyed filename) are problematic when attached to a process instance as part of a mail merge. The mail merge will not execute with this attachment and the process will stall.
 - PDF documents created using Adobe LiveCycle Enterprise Suite are not supported in modern browsers (e.g., Chrome 45 and later, Firefox 52 and later, Edge.) To view them, download and view them using Adobe PDF Reader, or convert the files to a format readable by browsers. To convert the file, open it in Adobe PDF reader, then print the document and choose Microsoft to PDF as the printer. This will create a PDF that can be uploaded and viewable in e-Builder.
- **Download:** Downloads the file, which allows you to save or make changes in its native application.
 - **Redline:** Annotates or marks up the file. Redlining does not modify the actual file. It creates an overlay on top of it that exists only in e-Builder. After you save your redline and return to the Documents module, a counter appears under the file name that shows how many redline layers have been created for the document.

Tip

To view a redline markup outside of e-Builder, save the markup as a.jpg (image).

- **Compare With:** Compares the file with another document saved in the document library. The document compare feature allows you to identify the changes that have been made to a file. You can view files in different ways to best suit your needs. Overlays with difference detectors, side-by-side views, and highlighting the additions and deletions are all options that are available to you. For instructions, see Compare Documents.
- **Send:** Sends the file via email, or via fax to an internal or external project participant. For instructions, see Send Documents.
- **Properties:** Displays individual file properties. For a description of this window, see File Properties General Tab Overview.
- **Edit:** This link is only available for Word, Excel and PowerPoint files. Click to edit any of these files types within their native application. The ability to edit documents directly from e-Builder will help you avoid having to download the file, make changes, save to your local directory, and then upload the file back into e-Builder. When you edit documents in place, all of your changes are saved in a temporary file that allows you to navigate away from the file and e-Builder, and return to complete your changes at your leisure. To save the updated document in e-Builder, click the **Check In** link,

and the file will be saved as a different version.



Note: Account administrators are able to check files in at any time. In the event that the person who originally checked the file out for editing is not available, account administrators will be able to undo checkout in the file's properties or by clicking Check In from the Project Documents page. The file will be saved as a new version and all changes made by the editor will be maintained.

For more information, see Edit Documents.

- **Check In:** This link is only visible to those who currently have the file checked out, and to account administrators. These users have the option to check files in if the file was checked out or is currently being edited.

Access Document History Page

The Access Document History page allows you to locate documents stored in the Documents module. Use this page to view the access history of specific files. From this page you're able to search for files that are currently in the system or have been deleted.

For instructions, see View Document Access History.

The fields and buttons located on this page are:

Fields and Buttons

- **Access Document History for:** Click to view document access history for a different project.

Filter Documents - Fields and Buttons

- **Document Name:** Enter the name of the file.
- **Document Type:** Enter the document's file extension.
- **Accessed By:** Enter a username to filter results by. Only one username can be entered at a time.
- **Company:** Enter a company name to filter results by. Only one company name can be entered at a time.
- **Access Type:** Click to select an access type to filter by.
- **Date Range:** Enter a date range to filter by. You can also click the calendar icons to select dates from the calendar.
- **Filter:** Click to filter by the selected criteria.

Results Table - Fields and Buttons

- **Version:** Display the document version number.
- **Document Name:** Displays the name of the file version.
- **Accessed By:** Displays the name of the user that accessed the file version.

- **Accessed By Company:** Displays the name of the company that the Accessed By belongs to.
- **Access Type:** Displays the method that the file version was accessed.
- **Timestamp:** Displays the date and time the file version was accessed.
- **Export to Excel® Icon:** Click to export the record to an Excel spreadsheet.

Sent Items Page

The Sent Items page allows you to search for files that have been emailed or sent via notification, from the Documents module. For steps on sending items from the Documents module, see Send Documents.

A description of the fields and buttons located on this page follows:

- **Cancel:** Click to cancel the search and return to the Project Documents page.
- **Project:** Displays the name of the project you are in.
- **Project Number:** Displays the project number, if available. Administrators have the ability to set project numbers by going to Setup > Projects > Project Settings. This is a string-type project custom field. For instructions on creating this field, see Manage Custom Fields.
- **Show Failed Messages:** Select this check box to include only failed messages in the filter results.

Filter

- **Sent To:** To search for a single user at a time, enter the name of participant that messages were sent to.
- **Subject:** Enter the subject of the messages you want to filter by.
- **File Name:** Enter the file name you want to include in the filter.
- **Date Sent Between:** Enter a date range that the file was sent to include in the filter.
- **Body:** Enter a single keyword or phrase contained in the body of the message to filter by. Avoid the use of commas.
- **Type:** Select the delivery type of the sent item.
- **Filter:** Click to filter by the selected criteria.
- **Reset:** Click to clear filter fields.

Messages

- **Subject:** Displays the subject of the message. Click to open message details in a separate window.
- **Date Sent:** Displays the date and time the item was sent.
- **To:** Displays the Name, Email Address that the item was sent to.
- **Sent By:** Displays the name of the user that sent the message.
- **Delivery Address:** If sent to an e-Builder contact or user, their delivery address displays here.
- **Status:** Displays the status of the items.
- **# Times Opened*:** Displays the number of times the file was opened. This number may be unreported if the recipient email client blocks images.

Document Log Page

The Document Log page displays a list of all project documents stored in the Documents module. You can use this page to learn about when a file was uploaded and by whom, the folder path where it is stored, its checked in or check out status, and where it is used throughout the system.

The following fields and buttons are available on this page:

- **# Files / # Versions / # Storage Used:** The # Files indicates the number of individual files that have been uploaded. If you upload new versions of a file, the # Versions count will include the versions.
Example: File A and B were uploaded yesterday. A new version of a file is uploaded today = 2 Files , 3 Versions
- **Show Empty Folders:** Select to show empty folders in the list below.
- **Show Checked-Out Files Only:** Select to filter for files that have been checked out.
- **Export:** Click to create one of these exports: Excel Data Export, CSV Data Export, or Tab Delimited Text.
- **Folder Name:** Displays the folder path where the file is stored.
- **File Name:** Displays the file name.
- **File Size:** Displays the file size.
- **Uploaded By:** Displays the name of the user that uploaded the file.
- **Date Uploaded:** Displays the date that files were uploaded.
- **Redline Count:** Displays the number of redlines saved on the file. Click to open the document.
- **Checked Out By:** If currently checked out, displays the name of the person that has the file checked out.
- **Date Checked Out:** If currently checked out, displays the name of the person that has the file checked out.
- **Attached To:** If the file is attached to a process, cost item or meeting item, the Attached To link displays. Click to view all items the file is attached to and associated details. The File Properties - Attached To window displays.

Find Deleted Items Page

This page will only display for users with administrative permissions.

The Find Deleted Items page allows you to search for, view, and recover deleted items.

Fields and Buttons

The fields and buttons located on this page are:

- **Search for:** Enter the name of the file, including the file extension that you want to search for.

Tip: Use an asterisk (*) as a wildcard search.

- **Search in:**
 - **File names:** Select to include document file name in search results.
 - **Folder names:** Select to include folder name in search results. Click the adjacent drop-down arrow to select a date range when items were deleted.
- **Search:** Click to search for deleted items. Results display in the table below.
- **Name:** Displays the name of the deleted file.
- **Date Deleted:** Displays the date that the item was deleted.
- **Deleted By:** Displays the name of the user that deleted the item.
- **Folder Path:** The folder path where the file was located displays underneath the file name. Click this link to open the Folder Properties - Recycle Bin page where account and project administrators can optionally restore the file.

Documents Custom Fields Page

Folder and document custom fields can be modified by system and project administrators only.

This menu option does not display if Project Document Control has not been enabled on the Project Details Settings tab. The administrator must also establish document type and custom field associations.

The Documents Custom Fields page is optimized for viewing document types and custom fields, which makes it easier to view or modify multiple folder and document custom fields at a time.

Fields and Buttons

The fields and buttons located on this page are:

- **Document Custom Fields for:** Click to view document custom fields for a different project.
- **Show untagged files only:** Select to display only those files and folders that do not have document custom fields filled out. See Update Document Custom Fields and Update Folder Custom Fields for more information.
- **File:** Displays selected file name. Click the left and right directional arrows to select the previous or next file in the selected folder.
- **Save:** Click to save changes.
- **File Description:** Enter a description of the file.
- **Document Type:** Click to specify a document type to be the default value for all uploaded files in this folder. If document types and custom field associations have been established, the associated custom fields appear in the Custom Field section below for you to choose from. For instructions on making these associations, see Associate Custom Fields with Document Types.

If the e-Builder Plan Room is enabled on your account, the document type classification is necessary for users to locate and view files in the plan room viewer.

Note: If a document type is set on the parent folder, it will display here automatically, because sub-folders inherit the document type selection of the parent folder.

- **Custom Fields:** This section automatically displays if a document type is selected that has custom fields associated to it. Enter a value for each custom field.

File Properties General Tab

This window is displayed when the document properties link is selected on the Project Documents page. The General tab is highlighted by default. From here you can view file property details and take the following actions:

- Redline Documents
- Move Documents
- Copy Documents
- Check Out Documents
- Check in Documents
- Revert to a previous version of the file

To revert to a previous

Fields and Buttons

- **View:** Click to view the file in a separate window.
- **Redline:** Click to add redline markups to the file.
- **Download:** Click to open the file or save it locally in its native format.
- **Delete:** Click to delete the file. You are prompted for confirmation.
- **Check In:** Click to check in the file. Only displays for files that are currently checked out. If a different file name is checked in, the new file name will be used, but the version number will be updated. Files can also be checked in by uploading the file (with the same name) into the same folder. For detailed steps on both methods, see Check In Files.
- **Undo Check Out:** Click to check in a file that was recently checked out.
- **Check Out:** Click to check out the file.
- **Revert to Revision:** Click this button to revert a file to a particular version. This button is displayed and available only when there are multiple versions of a document.
- **Move:** Click to move the file to a different folder or project. Moving files automatically deletes files in the original location. When a file is moved between projects all of the history associated with the file is deleted. Using this feature, users do not have to manually delete old files after they have been copied over. If you do not want to delete the original documents, do not move the files, you may choose to copy documents instead.
- **Copy:** Click to copy the file to another folder or project.
- **Save:** Click to save changes.
- **Cancel:** Click to discard changes and close this page. All unsaved changes will be lost.
- **Name:** Displays the name of the file. This is also an editable field. The version of the file displays in parentheses next to this field.
- **Description:** Displays a description of the file, if one exists. This is also an editable field.
- **Type:** Displays the file type.

- **Location:** Displays the folder path where the file is saved.
- **Size:** Displays the file size.
- **Added By:** Displays the user that uploaded the file to this folder.
- **Date Added:** Displays the date that the file was added.
- **Last Modified By:** Displays the user that last modified the file.
- **Date Modified:** Displays the date the file was modified.
- **Private File URL:** Displays the file's private web address, which can be sent to other e-Builder users. Recipients will have to log into e-Builder to access the file if they are not already logged in.
- **Public File URL:** Displays if the folder the file is saved in is a public folder. This is the files URL, which can be sent to external project participants.
- **Check Out By:** Displays the name of the person that currently has the file checked out.

File Properties Custom Fields Tab

This tab allows you to view and modify the file's document type and custom fields. This tab does not display if the Project Document Control has not been enabled on the Project Details Settings tab.

Tip

If you'd like to modify the custom fields for a number of files at a time, go to the Document Custom Fields page, where you can scroll through all the files in a given folder and specify the custom fields for each. For instructions, see Review Folder and Document Custom Fields.

Fields and Buttons

The fields and buttons located on this page are:

- **Save:** Click to save changes.
- **Cancel:** Click to discard changes and close this page. All unsaved changes will be lost.
- **Name:** Displays the file name.
- **Document Type:** Displays the file type. Click the drop-down arrow to assign a different file type.
- **Custom Fields:** This section lists all document custom fields that have been associated with the selected document type. For more information, see Associate Custom Fields with Document Types.

File Properties History Tab

The history log of a document allows account and project administrators to see who accessed the file, when the file was accessed, and in what manner.

Fields and Buttons

The fields and buttons located on this page are:

- **View History for All Versions:** Select to view the history for all document versions. The history for the most recent version displays by default.
- **Cancel:** Click to close this window.

- **Version:** Displays the version of the file. File versions can be created by uploading the same file (with the same name) into the version and by checking files out and then checking them in again. See Check Out Files and Check In Files for more information.
- **Name:** Displays the name of the person who accessed the file.
- **Company:** Displays the company associated with the person that accessed the file.
- **Timestamp:** Displays the date and time that the file was accessed.
- **Access:** Displays the manner in which the file was accessed.

File Properties Permissions Tab

This tab allows you to view and modify file permission settings. When a document is uploaded, it inherits the parent folder's permission settings, but you can change settings for individual files as well. Document permissions are role specific, and cannot be set for individual users. Add the roles you wish to specify permissions for, and then create your settings for each selection.

From this tab, you can Redline documents.

Fields and Buttons

The fields and buttons located on this page are:

- **OK/ Apply:** Click to save changes.
- **Cancel:** Click to cancel and close this window. All unsaved changes will be lost.
- **Add:** Click to open the Add Permissions window and select the roles or users you want to set access rights for. For your convenience, you have the choice of specifying permissions on the Add Permissions window or on this page; the same permission check boxes are available on both.
- **Remove:** Click to remove the selected role from the list of roles below. If a role is not listed, it means that role does not have access to this file.
- **List Members:** Click to open the Members window and view who the members of the selected project role are.
- **View:** Select to allow users in the highlighted role permission to view this file in this project. (Any author or recipient of the file will be able to see the files they created/ received, regardless of this permission.)
- **Download:** Select to allow users in the highlighted role to download the file to a local storage in the native file that the file was uploaded in.
- **Redline Markup:** Select to allow users in the highlighted role to redline or mark up a file.
- **Modify:** Select to allow users in the highlighted role to update the document name and description. This allows you to have version control to this file. If not selected, a new file will be created upon upload with a sequential number versus another version.
- **Delete:** Select to allow users in the highlighted role to delete this file, even if another user created it.
- **Change Permissions:** Select to allow users in the highlighted role to Update permissions for this file.
- **No Access:** This role has no access to this file. This permission overrides any other permissions the user may be granted. Once you have selected your permissions, click **Apply**.

File Properties Versions Tab

This tab allows you to view the different version of the file. File versions can be created from checking out and checking in files as well as by uploading new versions of the same file, as long as the file name is the same. From this tab you are also able to view and download files.

Fields and buttons

The fields and buttons located on this page are:

- **Cancel:** Click to close this window.
- **Compare:** Select the check box of the two versions you wish to compare and then click Compare. This button appears only when there is more than one version.
- **View:** Click to view the file in a separate window.
- **Download:** Click to download the file.
- **#:** Displays the file's version number. Click to view the general properties of this file.
- **File Name:** Displays the file name. Click to view the general properties of this file.
- **Description:** Displays the file description.
- **User:** Displays the user that uploaded the file.
- **Date Created:** Displays the date the file was created.

File Properties Attached To Tab

This page provides a list of all the items the document is attached to. A document can be attached to any of the items listed below:

- Budget, Commitments, Invoices
- Bid Packages
- Forms
- Process Instances
- Planning Scenarios

Fields and Buttons

The fields and buttons located on this page are:

Forms

- **Project:** Displays the name of the project that the file was attached in.
- **Form:** Displays the form type that the file was attached to.
- **Subject:** Displays the subject of the form.
- **Author:** Displays the name of the user that attached the file.
- **Held By:** Displays the name of the user whose court the form is currently in.
- **Date Due:** Displays the form's due date.
- **Attach Type:** Displays the manner in which the file was attached.

Process Instances

- **Project:** Displays the name of the project that the file was attached in.
- **Process:** Displays the form type that the file was attached to.
- **Subject:** Displays the subject of the process.
- **Date Due:** Displays the date that the process step is due.
- **Step Name:** Displays the step that the process is currently in.
- **In Step Since:** Displays how long the process has been in the current step.

Working with Documents

From the Documents module, you can do perform the following actions on documents:

Upload Documents

To upload documents

1. Go to the Project Documents page.
2. Select the folder that you want to upload files to.
3. Click the **Upload** link.
4. Drag and drop your files to the **File Upload** window.

—Or—

Click **Browse** and locate the files to upload.

Tip: You can also drag and drop (or browse) your files to the Documents content pane.

Open Documents

From the Project Documents page, you will only see the folders and files you have access to. By default, the contents of the folder appear in the Content Pane.

To open documents

1. Go to the Project Documents page.
2. Select the folder that holds the file you want to open.
3. Click the title of the document.

Download Documents

Downloading documents gives you the option to open the file for immediate viewing or save the file locally. This option might be confused with checking-out files, which should only be done if you want to restrict access to a certain document while you make changes to it. For more information, see Check Out Documents.

To download documents

1. Go to the Project Documents page.
2. Navigate to the file you want to download.
3. Click the **Download** link located under the file name you want to download.

4. Click Open to open the file.

—Or—

Click **Save** to save the file locally.

Delete Documents

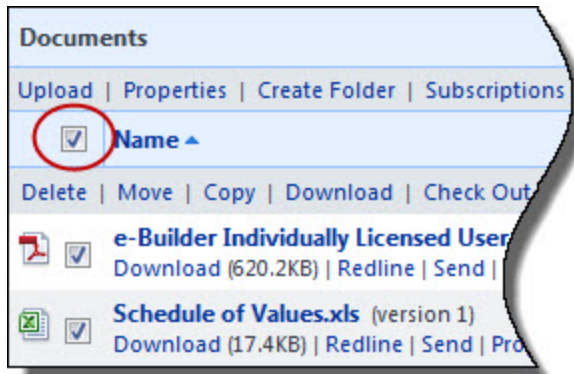
Deleting documents removes the files from the Documents module. However, if the file was attached to in other modules in e-Builder, such as Forms or Processes, the attached files will not be deleted. Only users with delete permissions for the folder where the file is stored is able to perform this function. Once files are deleted, they can only be recovered by an account or project administrator.

To delete documents

1. Go to the Project Documents page.
2. Navigate to the file you want to delete.
3. Select the check box next to the file you want to delete.

—Or—

To delete all the files in the folder, click the **Select All** check box.



4. Click the **Delete** link. You are prompted for confirmation.
5. Click **OK**.

Move Documents

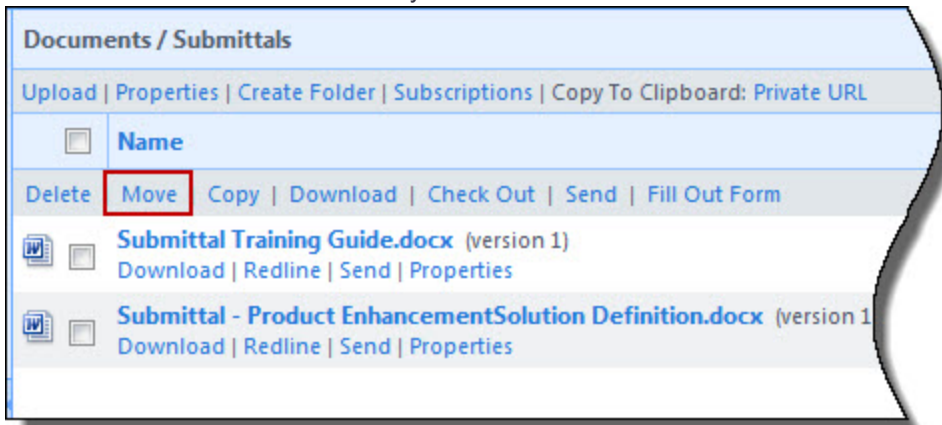
You have the ability to move files between folders and across projects. Moving files automatically deletes them from the original location. When a file is moved between projects, all of the history associated with the file is deleted. When using this feature, you do not have to manually delete old files after they have been copied over. If you do not want to delete the original document, you might choose to copy documents instead.

Note: You need to have Create Folder permissions and Modify Document permissions to perform this task. For instructions, see Edit Folder Permissions and View/Edit (Manage) Document Permissions.

To move documents between folders or projects

1. Go to the Project Documents page.
2. Navigate to the file you want to move.

3. Select the check box next to the file you want to move.



4. Click the **Move** link located above the file list.

The Move File window is displayed.

Note: If you do not want the file to inherit the permissions of the folder you are moving the file to, clear the **Inherit file permissions from destination folder** check box as this setting is enabled by default.

5. To move files to a different folder within the same project, click the folder name. When prompted, click **OK**.

—Or—

To move files to a different project, select the project from the **Move [number of files] to Project** drop-down menu. Navigate to and select the destination folder. Click **OK** on the confirmation dialog box.

Copy Documents

Documents can be copied to different folders and across projects by anyone with access to the file.

Note: You need to have Create folder permission on the folder you are copying the file to in order to perform this task. For instructions, see Edit Folder Permissions.

To copy documents

1. Go to the Project Documents page.
2. Navigate to the file you want to copy.
3. Select the check box next to the file.
4. Click **Copy**.
5. To copy files to a different folder within the same project, click the folder name. You are prompted for confirmation. Click **OK**.

—Or—

To copy files to a project, click the projects drop-down arrow and select a project. Navigate to and select the destination folder. When prompted, click **OK**.

Check Out Documents

The Check Out feature in e-Builder allows you to hold exclusive rights to upload new versions of a document. When a document is checked out, all other users are blocked from uploading a new version of the file. The benefit of using this feature is that all users are informed that you are making updates to the file, and it prevents them from uploading their changes while you have the file checked out.

To check out documents

1. Go to the Project Documents page.
2. Navigate to the files you want to check out.
3. Select the check box next to the files.
4. Click the **Check Out** link located above the file list.
5. To download the file at this time, click **OK**.

—Or—

To confirm the check out, but not download the file, click **Cancel**.

Revert Document to a Previous Version

When there are multiple versions of a document, e-Builder allows you to revert a file to a particular version.

To revert a document to a previous version

1. Go to the Project Documents page.
2. Click the Properties link for the document you wish to revert. The File Properties window is displayed and the General tab is displayed by default.
3. Go to the File Properties - Versions tab.
4. Click the file name of the previous version of the file that you wish to revert to. The File Properties - General tab of that version is displayed.
5. Click the **Revert to Revision** button. You will be prompted to confirm whether you wish to revert the document to this version of the file.
6. Click **OK** to confirm. The selected version will be added as a new version number (incremental).

Undo Check Out

In that event that files were checked out by accident, the person that checked the file out has the ability to reverse this action and undo check out.

To undo check out

1. Go to the Project Documents page.
2. Navigate to the folder where the file was checked out of.
3. Click the file's **Properties** link.
4. On the File Properties window, click **Undo Check Out**.
5. Click **Save**.

Check in Documents

Only the user who checked out the document and administrators have the ability to check in files. In the event that documents were checked out by accident, you can undo check out. There are two other ways to check in a file: by uploading the file (with the same name) into the folder it was checked out of, or by clicking the Check In button in the File Properties window. You will not be able to check in a document if its name has changed because it will be considered a new file.

Undo Check Out

To undo check out

1. Go to the Project Documents page.
2. Navigate to the folder where the file was checked out of.
3. Click the file's **Properties** link.
4. Click **Undo Check Out**.
5. Click **Save**.

Check In by Uploading into Folder

To ensure a successful check in, please make sure that you are checking in the exact same file name. The version number will automatically update after the file has been uploaded.

To check in a file by uploading it

1. Go to the Project Documents page.
2. Navigate to the folder where the file was checked out of.
3. Click **Upload**.
4. Click **Select Files** to navigate to and select the file you want to check in.
5. Click **Upload Now**.
6. Click **OK**.

If document custom fields are enabled on your account, the Update Custom Fields window is displayed.

7. Update document custom fields.
8. Click **Save**.
9. Click **Close**.

Check In via File Properties Page

Note: If a different file name is checked in, the new file name will be used, and the version number will be updated.

To check in a file via file properties

1. Go to the Project Documents page.
2. Navigate to the folder where the file was checked out of.
3. Click the file's **Properties** link.

4. Click **Check In**.
5. On the Upload File page, click **Browse**.
6. Navigate to and select the file.
7. On the Upload File page, click **Upload File**.
8. On the File Properties tab, click **Save**.

Compare Documents

Compare documents to each other in order to identify the changes that have been made to the file. You can view files in different ways to best suit your needs; overlays with difference detectors, side-by-side views, and highlighting the additions and deletions are all options that are available to you.

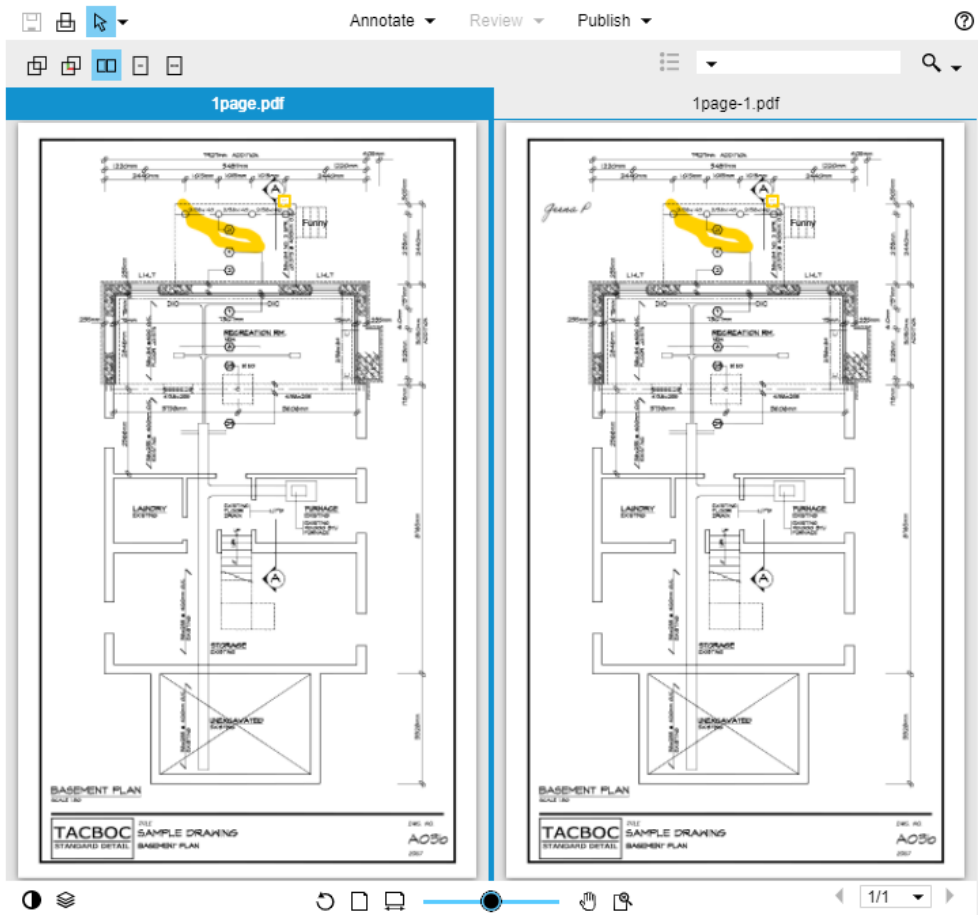
Note: To compare documents, you must have Redline Markup permission for the folder in which those documents are located.

To compare documents

1. Go to the Project Documents page.
2. Navigate to one of the documents you want to compare and click **Compare With**.



3. On the Compare Documents from window, select the check box next to the other document to use in the comparison.
4. Click **Compare**.
The files open in the Compare Tool.



Send Documents

The send feature allows you to send files directly from the Documents module to individuals who are not licensed e-Builder users or to license holders who do not have access to specific folders on the project. Files can be sent via email. You can also notify internal users of files by choosing the notify option. This sends users the name of the files and a link to where the files can be retrieved in e-Builder. You can send / notify a single file or a group of files located in the same folder.

To send files or notify users

1. Go to the Project Documents page.
2. Navigate to and select the check box next to the files you want to send.
3. Click the **Send** link located above the file list.
4. Select a method for sending:
 - **Email:** Email files to internal or external project participants
 - **Notify:** Notify internal project participants
5. Click **Next**.
6. Complete all necessary fields.

Tip

When sending an email, use your keyboard to auto-fill and select the desired email addresses. Begin typing the recipient's name or email address, then use the arrows to highlight the email of choice, and then click **Tab** to make the selection.

7. Click **Send**.

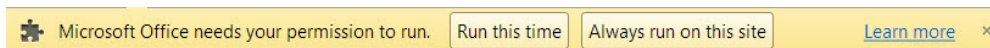
Browser Settings for Editing Documents in Place

When editing files for the first time using Google Chrome™ or Mozilla® Firefox®, you will be prompted to complete browser settings as described below.

- Google Chrome™ Browser Settings
- Mozilla® Firefox® Browser Settings

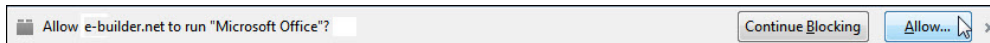
Preliminary Settings for Google Chrome™ Browser

In the Google Chrome browser, a message from Microsoft Office appears in the banner of every page that includes an Edit link. Click **Always run on this site** to enable document editing from e-Builder Enterprise. This is a one-time setting that will not have to be reconfigured.

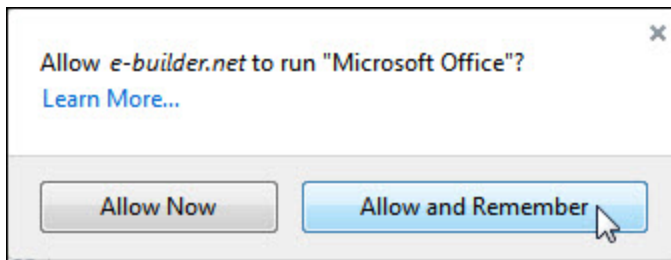


Preliminary Settings for Mozilla® Firefox® Browser

When using the Mozilla Firefox browser, you will be prompted to allow e-Builder to run Microsoft® Office®. This message will appear in the banner of every page that includes an Edit link. Click **Allow** to enable document editing from e-Builder Enterprise.



A subsequent message displays, requesting you to choose a setting for future occasions. Click **Allow and Remember**.



Edit Documents

Note: This feature is only compatible with Microsoft® Office versions 2010 and above. If an earlier version of Office is installed on your machine, the Edit link will be disabled. If your organization utilizes a different version of Office and you wish to disable this feature on your account, please contact e-Builder Support.

All Word, Excel® and PowerPoint® files that you have the permission to modify can be edited directly from e-Builder Enterprise. An Edit link appears next to each document of these file types to help you avoid having to download the file, make changes, save to your local machine, and then uploading the file back in to e-Builder.

Note: Account administrators are able to check files in at any time. In the event that the person who originally checked the out for editing is not available, account administrators will be able to undo check out via in the file's properties or by clicking Check In from the Project Documents page. The file will be saved as a new version and all changes made by the editor will be maintained.

Editing Documents

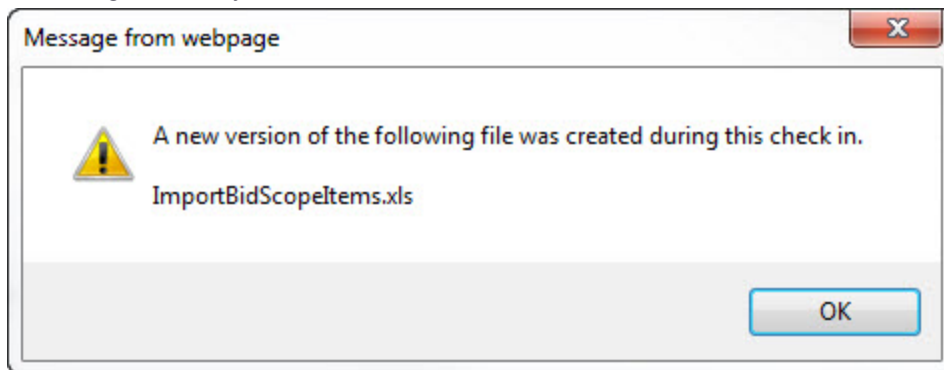
To edit documents in place

1. Click the **Edit** link next to the file you wish to edit.
The file opens in its native application.
2. Make changes as necessary and remember to save along the way.

Note: You are able to navigate away from the document and e-Builder if necessary - your changes will be saved, as long as you save the file in its native application.

3. When your edits are completed and you're ready to check the file back into e-Builder, click **Check In** next to the file.

A message informs you that a new version of the file will be saved.



4. Click **OK**.
If document control is enabled, you are prompted to complete document custom fields.
5. If necessary, update document custom fields, click **Save**, and then **Close**.

Copy Document URL

A document's URL can be copied and then shared with internal project participants. Recipients will have to login to e-Builder to view the document if they are not already logged in.

To copy a document's URL

1. Go to the Project Documents page.
2. Click the file **Properties** link, located under the file name.
3. Click the **Copy to Clipboard** link just under the **File URL** field.
4. Share the URL on a Web page or paste it into your email or instant messaging tool to send it.

Update Document Custom Fields

This action can be completed by Administrators and users with Document Import permissions only.

Note: In order to tag documents with custom fields, the administrator must enable account-level document control and establish document custom fields per document type. The individual project must also have project-level document control enabled.

When all of these settings are in place, users will be automatically prompted to complete the document custom fields every time they upload a file to the Documents module. Tagging documents cannot be required, and users can bypass the custom field assignment.

To update document custom fields

1. Go to the Project Documents page.
2. Click the **Properties** link under the document file name.
3. Click the **Custom Fields** tab. The Custom Fields tab will not display if Project Document Control is not enabled.
4. Update the custom fields as necessary.
5. Click **Save**.

Import Document Custom Fields

This task can be completed by:

- *Account Administrators*
- *Participants with 'Document Import' Permission*

Prerequisite: Set Up Document Custom Field Import File

Document custom fields can be imported for multiple projects at a time. When document control is enabled on a project, participants are able to complete document custom fields at the time of upload. However, non-required fields may not always be entered. Also, administrators may feel more comfortable completing these fields to ensure consistency. Importing document custom fields is a great time-saving tool that allows you to manage these fields more easily.

To import document custom fields

1. Click **Documents** from the Top Navigation tabs.
2. In the Quick Links menu located in the upper right corner of the page, click **Import Document Custom Fields**.
3. Click **Browse** to search for and select the import file.
4. Click **Next**.
5. If necessary, map the e-Builder built-in fields to the corresponding fields in the import file.
To learn more, see Set Up Document Custom Field Import File.
6. Click **Next**.
7. Review the import summary. If there are exceptions, click **Previous** to make necessary changes.
—Or—
If there are not necessary changes, click **Import**.

Set Up Document Custom Fields Import File

Document custom field imports are compatible with Microsoft Excel® .xls and .xlsx files. A single import file can include custom fields for multiple projects. The distinction will be made by the value of the project identifier being used in the import file.

The image below includes the name of all fields that can be added to the header row of the spreadsheet. This image is also of the mapping step that will be encountered during the import.

If the headers in your file match these fields exactly, they will auto-populate. If the header names are different, you must map the corresponding columns in your spreadsheet to the e-Builder built-in fields in step 2 of the import wizard. The Document Custom Fields section lists all available document custom fields on the account. These field labels should also be column headers in the file.

Description of Required and Optional Fields for Import File

e-Builder Field Name/ Import File Column Header	Description	Required/Optional
Project Identifier	Select a Project Identifier. This is a unique ID that will identify which project the document custom field is associated with. Examples include project name and project number. To learn more about project numbers, see Create Project Number Custom Field.	Required
File Name	Include the name of the file exactly as it is saved in the Documents folder structure, including the file extension.	Required
Folder Path	Enter the folder path that the file the currently saved in, such as Documents/Construction/Specifications.	Required

e-Builder Field Name/ Import File Column Header	Description	Required/Optional
Description	Enter a description for the custom field value. Blank values will not change existing entries, however, new values will overwrite existing ones.	Optional
File Version	Enter the file's version number	Optional
Document Type	Enter the document type in this field. Blank values will not change existing entries, however, new values will overwrite existing ones.	Optional
Document Custom Fields	By default, all available document custom fields display on the Field Mappings page, as illustrated in the above image. Make the custom field labels, column headers and enter the desired value in the appropriate columns.	Optional

View Sent Items

You are able to see a list of messages that have been sent from the Documents module. These items include emails and notifications. You are able to narrow your search by filtering based on specific criteria.

To search for and view a list of sent items

1. Go to the Project Documents page.
2. In the Project Menu, click **Sent Items**.
3. Filter for messages.

Note: All sent items display by default, and you may not have to use the filter.

About Redlining Documents

Adding redline markups allow you to annotate the file. Redlining does not modify the actual file; it creates an overlay on top of it that exists only in e-Builder. After you save your redline and return to the Documents module, there's a counter under the file name that shows how many redline layers have been created for the document.

Tip

To view a redline markup outside of e-Builder, save the markup as a PDF or TIFF.

Guidelines for Redlining Documents

The Redline tool is intended for markups of small to medium sized PDF files. A general rule of thumb is to use files under 500 pages and under 250 MB. If your file does not open quickly and is near this size, we suggest splitting the PDF into two separate files and working from there.

Required Permissions





In order to:	You need these permissions:	Notes for Administrators:
Redline files	Redline Markup	Redline permissions can be granted for an individual file or folder.
View redlined files	View	

o

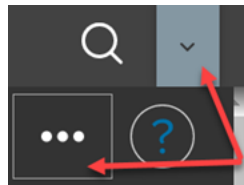
Redline Documents

Using the built-in redlining feature, you can redline documents. You can then save the redline markups to your local machine as a PDF or TIFF file. This is the only way to save redlined files and make them available outside of e-Builder. This also allows you to make marked up files available to team members who do not have permission to view redlined documents.

To redline documents

1. Go to the Project Documents page.
2. Navigate to the file you want to redline.
3. Click the **Redline** link located below the name of the file you wish to redline.
The file opens up in a separate redlining window.
4. Click the **Markup** icon  located in the upper left corner of the window.
5. Click **New Markup**.
6. From the Annotations drop down, select the type of markup you wish to make.
7. Once the document has been marked up, do any of the following:
 - o To save the file, click the **Markup** icon > **Save Markup**. Enter a unique name and then click **OK**.
 - o To save the file as a PDF, click the **More** icon  > **Publish to PDF**.
 - o To save the file as a TIFF, click the **More** icon  > **Publish to TIFF**.
 - o To print the file, click the **More** icon  > **Print**.


Tip: You may need to maximize the redlining window to see the **More** icon.



Note: Click the Help icon located on the upper right corner of the window. A new window displays the in-app help that describes all the options available on the redline window. Depending on your browser settings, your redline window may be 'hidden' behind the help window.

Open Redlined Documents

To open a redline document

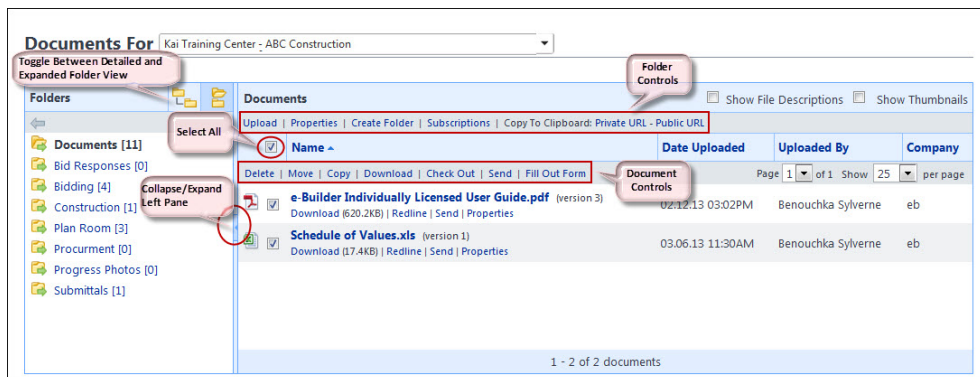
1. Go to the Project Documents page.
2. Navigate to the redline file you want to open.
3. Click the **Redline** link located below the file name.
The file opens in a separate window.
4. Click the **Markup** icon  located in the upper left corner of the window.
5. Click **Open for edit**.
6. From the **Available markup files** dialog box, select the version you wish to view.
7. *Optional:* Select the **Show first** check box and select an option from the list if you would like the viewer to automatically pre-load the first instance of this option when the markup is loaded (forwarding the document to that page). For example, if you only want to review signatures, and the first signature is on page 10 of the document, selecting the Signature option will load the markup file beginning with the signature item located on page 10.
8. Click **OK**.

Tip

If you save each of the redline versions as separate files in e-Builder, you will be able to compare at least two of the documents side by side. See Compare Documents for more information.

Document Folders

The Documents page is central to working with documents. The folder structure is located in the left pane. When you select a folder, it displays its contents in the adjacent content pane.



To access the Project Documents page

1. Click the Documents tab located on the top navigation tabs.
2. Choose a project from the **All Projects** menu.
The Project Documents page is displayed.

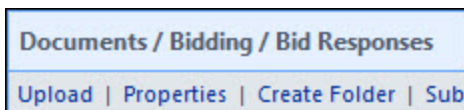
Folders

From each project's Documents folder, you can switch between the detailed and expanded folder views.

- **Expand All:** Expands all folders and subfolders.
- **Collapse All:** Collapses all folders and subfolders.
- **Refresh All:** Refreshes the items in the content pane.

Content pane

- **Folder Path:** The selected folder's path is displayed at the top of the content pane. Click the name of a folder within the folder path to open it.



- **Show File Description:** Shows the file descriptions on the content pane.
- **Show Thumbnail:** When this check box is selected, file thumbnails will be displayed. To avoid negative impacts on page loading performance when file thumbnails are enabled, e-Builder has limited the display of File Thumbnails to solely image file types with the following extensions:
 - png (Portable Network Graphic)
 - gif (Graphics Interchange Format)
 - bmp (Windows Bitmap)
 - jpeg (Joint Photographic Expert Group image)
 - jpg (Joint Photographic Expert Group image)

When File Thumbnails are enabled, other file extensions will not display thumbnails. However, the following file types will display a PDF, DOC, or XLS icon instead of a file thumbnail:

- pdf (Adobe Portable Document Format)
- doc (Microsoft Word)
- docm (Microsoft Word with macros)
- docx (Microsoft Word)
- dot (Microsoft Word template file)
- dotx (Microsoft Word template)
- xls (Microsoft Excel)
- xlsb (Microsoft Excel)
- xlsm (Microsoft Excel Macro-enabled)
- xlsx (Microsoft Excel)
- xlt (Microsoft Excel Template)

A generic icon will be displayed for other file types.

Folder controls

- **Upload:** Adds a new file to the selected folder.
- **Properties:** Views the selected folder properties.

- **Create Folder:** Creates a new folder inside the current folder.
- **Subscriptions:** Creates a folder subscription. Folder subscriptions allow you to set up email notifications when a change is made to the folder and its contents. For more information, see [Subscribe Yourself to Folders](#). If you are an Administrator, you can also [Subscribe Users to Folders](#).
- **Copy to Clipboard:** Copies the folder's web address for distribution to external users. To make this folder available for public access, you must choose a public access permission setting located in the properties of the folder. For detailed steps, see [Enable Folders for Public Access](#).
- **Private URL** - Copies the private URL. This allows you to send the folder path to an e-Builder user. If the recipient is not already logged into e-Builder, they'll be required to login in order to access the file.
- **Public URL** - Displayed if the folder is enabled for public access. Click to copy the URL to the clipboard.
- **Email Address** - Displayed if the folder is configured to accept email from external parties. Click to copy the email address to the clipboard. For instructions on configuring the folder to accept email, see [Email Enable Folders](#).

Folder Properties - General

This window is displayed when the folder "properties" link is selected on the Project Documents page. The General tab is highlighted by default.

From this page, you can take the following actions:

- Move folders
- Give Public Access to Folders
- Enable Folders for Public Access
- Email Enable Folders

Buttons

- **Save:** Click to save changes.
- **Move:** Click to move the folder to a different folder within the project's folder structure. Please note that moving folders does not create a duplicate, rather the folder is completely removed from its original location.
- **Delete:** Click to delete the folder. You are prompted for confirmation.
- **Cancel:** Click to discard changes and close this page. All unsaved changes will be lost.

Fields

- **Name:** Displays the name of the folder. This is also an editable field.
- **Description:** Displays a description of the file, if one exists. This is also an editable field.
- **Document Type:** Displays the document type selection for this folder. This can be defaulted by the administrator on the Custom Fields tab.
- **Folder URL:** Displays the folder's private web address. Recipients will need to login to e-Builder Enterprise™ in order to view folder contents.
- **Location:** Displays the folder path of the folder location.

- **Added By:** Displays the user that created the folder.
- **Date Added:** Displays the date that the folder was added.
- **Last Modified By:** Displays the name of the person that made changes to the folder last.
- **Date Modified:** Displays the date that the folder was modified.
- **Public Folder URL:** Displays only if the folder is public. Otherwise, Folder is not public displays. If enabled for public access, the public web address displays for you to provide external users folder access. For instructions, see Enable Folders for Public Access.
- **e-Builder Sync URL:** Displays the e-Builder sync URL that can be used to create a shortcut to this folder when transferring files using e-Builder Sync. e-Builder Sync allows you to transfer files between your local computer or network server and the e-Builder document structure. This field is displayed only if this feature is enabled for the account and project. Account administrators have the ability to enable this feature. For instructions, see Set up e-Builder Sync Options.
- **Public Access Permissions:** Click to select a public access permission setting. For instructions, see Give Public Access to Folders.

Choose from the following:

- **No public access allowed:** (default selection)
- **Allow access without registration**
- **Require registration to access:** Select this option to require the recipient of the folder URL to create an e-Builder username and password in order to login to the system. You will then be able to view a list of all registered users by clicking the Public Access History tab: Registered Visitors tab, from this window. See Folder Properties Public Access History Tab for an overview of this page.
- **Show public sub-folders on public view:** This check box is displayed when you choose to allow public access. Select this check box to also enable access to sub-folders.
- **Folder Access Options: Allow Email In:** Select to allow both internal and external users to email files to this folder. Three additional options display:
 - **Store entire email message:** Select this check box to store both the email and its attachments in this folder.
 - **Store attachments separately:** Select this check box to store attachments in the same folder, but as a separate item than the message.
 - **To send e-mails to this folder, use:** A default email address will populate in this field that may be edited, but it must be a unique name. This will be the email address for this folder.

Folder Properties - Custom Fields

This tab allows you to view and modify the folder's default document type and set default values for the custom fields.

This tab does not display if the Project Document Control has not been enabled on the Project Details Settings tab. The administrator must also establish document type and custom field associations.

From this tab, you also have the option to set custom fields to read only so that users cannot change the default value. Applying default values will apply them to all files currently in the folder.

If you would like to modify the custom fields for multiple files or folders at once, go to the Document Custom Fields page, where you can scroll through all the files in a given folder and specify the custom fields for each.

Fields and Buttons

The fields and buttons on this page are:

- **Save:** Click to save changes.
- **Cancel:** Click to discard changes and close this page. All unsaved changes will be lost.
- **Apply default values to all files within this folder?:** Select to apply the defaulted custom field values to all files within this folder.
- **Document Types:** Click to select a default document type for the files in this folder. Associated custom fields display in the Custom Fields section below. For instructions on establishing document type and custom field associations, see Associate Custom Fields with Document Types.
- **Custom Fields:** Displays the custom fields that are associated with the document type. Enter a value for each custom field.

Related Topics:

- Add Document Types
- Add Document Custom Fields

Folder Properties - History

The history log of a folder allows account and project administrators to see who accessed the folder, when it was accessed, and in what manner. Below is a description of the fields and buttons located on this page.

- **Name:** The name of the user who accessed the folder.
- **Company:** The company associated with the users who accessed the folder.
- **Timestamp:** The date and time that the folder was accessed.
- **Access:** The manner in which the folder was accessed.

Folder Properties - Permissions

This tab allows you to view and modify folder permission settings. When a document is uploaded, it inherits the parent folder's permission settings. Even though settings for individual files can be changed, it is not recommended. Folder permissions are role specific, and cannot be set for individual users. Add the roles you wish to specify permissions for, and then create your settings for each selection. For instructions, see View/ Edit Folder Permissions.

Note: If the role is not listed in the folder permissions, it means that the specific role does not have access to this folder. For instructions on granting a role folder access, see Add Account Roles to Folders.

To access the Folder Properties Permissions tab

1. Go to the Project Documents Page.
2. On the Project menu, click on the **Folder Permissions** link.
The Folder Permissions page is displayed.

The fields and buttons located on this page are described below:

Toolbar options

- **Apply:** Select one of the following options:
 - **Apply to folder:** Select to apply folder permissions to only the current folder.
 - **Overwrite existing (folder & subfolders):** Select to overwrite the current permission settings and apply folder permissions to sub-folders and their files.
 - **Apply changes (folder & subfolders):** Select to replace existing permissions in sub-folders with this folder's permissions for only the changes that we just made. If only one role was updated it will apply just that role to the files and sub-folders and will ignore every other role.
- **Add:** Click to open the Add Permissions window and select the account roles or users you want to set access rights for. For your convenience, you have the choice of specifying permissions on the Add Permissions window or on this page; the same permission check boxes are available on both.
- **Remove:** Click to remove the selected role from the list of roles below. This effectively removes restricts this role from having access to this folder.

Folder Permissions

- **Document Owner:** This role is displayed by default and refers to the person who originally uploaded the file. Users with Modify permission are able to change the permissions for this role, but by default, the Document Owner inherits the following permissions:
 - View
 - Download
 - Redline Markup
 - Modify
 - Version Control
 - Delete
 - Change Perms

Note: The Document Owner automatically inherits Version Control permission which will allow them to delete all versions of a file. Take careful consideration of the document owner's role before allowing them to maintain all of the default permission settings. For example, if an administrative assistant uploads an initial set of shop drawings, you may or may not want to give them the permission to delete all subsequent versions of those drawings.

- **Members List:** Click a user group or role link to open the Members window and view the members of the selected project role group.
- **View:** Select to allow users in the highlighted role permission to view this folder in this project and in all projects that the file is available in. (Any author or recipient of the file will be able to see the files they created/ received, regardless of this permission.)

Note: The permissions to the files can be changed on the file level by going to the File Properties Permissions Tab. The author of the file will always have full access.

- **Download:** Select to allow users in the highlighted role to download the file to a local storage in the native format that the file was uploaded in.

- **Redline Markup:** Allows users to redline files and compare documents.
- **Modify:** Allows users in the highlighted role to update the folder, document name and description.
- **Version Control:** Allows users in the highlighted role to check files in and out. This will allow them to create new versions of a file.

Note: For attached documents within processes, version control will always be enabled on the specified default folder, regardless of the step actor's permission levels.

- **Create:** Allows users in the highlighted role to upload files to this folder.
- **Create Folder:** Allows users in the highlighted role permission to create sub-folders.
- **Delete:** Assigning the Delete permission to the Document Owner, a User or Group will allow them to delete files that they created in that folder.
Assigning the Delete permission to an actual role will allow them to delete files (even those that they did not create) and the folder itself.
- **Change Perms:** Allows users in the highlighted role to update permissions for this folder.
- **Public Access:** Allows users in the highlighted role to configure a folder's public access settings. The users can make a folder public or private, require registration to access the folder or allow access to it without registration.
- **No Access :** This role has no access to this file. This permission overrides any other permissions the user may be granted.

Folder Properties -Subscribers

The Subscription tab allows you to manage folder subscriptions for yourself, and if you are an administrator, for others as well. You are able to complete the following tasks from this page:

- Subscribe yourself to Folders
- Unsubscribe yourself or users from folders
- Edit folder subscriptions for yourself
- Subscribe users to folders
- Edit folder subscriptions for users

Fields and Buttons

The fields and buttons located on this page are:

- **Subscribe:** Click to create the folder subscription.

Note: If you subscribe yourself to a folder, you're able to unsubscribe at any time, but if the subscription was created by an administrator, only the administrator can cancel your folder subscription.

- **Cancel:** Click to cancel and close this window. All unsaved changes will be lost.
- **Action:** Select the action that you want to take:
 - **Subscribe:** Select to create a folder subscription.
 - **Unsubscribe:** Select to unsubscribe the folder. This option is only available when you subscribe yourself or you are an administrator.

- **Modify Subscription Type:** Select to make changes to the details of this subscription. This option is only available when you subscribe yourself or you are an administrator
- **Subscribers**
 - **Subscribe Myself:** Select to add yourself to the folder subscription.
 - **Available Subscribers:** Select the Roles, Groups, and/or individual users to add to the subscription. This option is available to Administrators only.
- **Subscription Type**
 - **Daily Summary:** Select to receive email that summarizes of activity of this folder daily.
 - **Instant Notification:** Select to receive an email notification as soon as any activity is taken on the folder.
- **Include Subfolders:** Select to include subfolders in the subscription.

Folder Properties -Recycle Bin

This tab is only visible to users with administrative permissions. The Recycle Bin tab lists all deleted files and folders and makes it possible to restore them. For instructions, see [Restore Deleted Documents](#).

Fields and Buttons

The fields and buttons located on this page are:

- **Restore:** Click to restore deleted items to their original location and status.
- **Cancel:** Click to close the window.
- **Name:** Displays the name of the deleted item.
- **Date Created:** Displays the date and time the item was created.
- **Date Deleted:** Displays the date and time the item was deleted.
- **Deleted By:** Displays the user's name that deleted the item.

Folder Properties - Public Access History

The Public Access History tab is only visible to users with administrative permissions. This tab allows you to view the access history of public folders. From this tab you're be able to see the person's name, time of access, and the contact information of all project participants that have ever accessed this folder. For instructions, see [View Access History of Public Folders](#).

Fields and Buttons

The fields and buttons located on this page are:

Access History Tab

This tab allows you to see the number of times this folder has been accessed.

- **Timestamp:** Displays the date and time the folder was accessed.
- **Company:** Displays the company name associated with the person that accessed the folder.
- **Name:** Displays the name of the person that accessed the folder.

- **Email Address:** Displays the person's email address.
- **Cancel:** Click to close this window.

Registered Visitors Tab

This tab displays the information of registered visitors.

- **Company:** Displays the company name associated with the person that accessed the folder.
- **Name:** Displays the name of the person that accessed the folder.
- **Email Address:** Displays the person's email address.
- **Cancel:** Click to close this window.

Import Folder Permissions Page

You are taken through a two step wizard when importing folder permissions.

A description of each step is below.

Note: For detailed steps see Import Folder Permissions.

Step 1

- **Remove permissions not in import file:** Select to remove existing permissions in e-Builder that are not in the import file.
- **Download Import Template (.xls):** Click to download a template of the import file to help you get started. The headers of your import file should include the following titles:
 - Folder Path
 - Group, Role, or User
 - View
 - Download
 - Redline Markup
 - Modify
 - Create
 - Create Folder
 - Delete
 - Change Perms
 - No Access
- **Browse:** Click to select the import file.
- **Next:** Click to go to the next step of the import process after all fields have been completed.
- **Cancel:** Click to cancel the import and return to the Folder Permissions page.

Step 2 (Review)

- **Preview Tab:** This tab is displayed by default and allows you to review the details of the import; whether it was successful or not. The number of rows imported appears on the tab name.
- **Exceptions Tab:** Lists details of all errors, if any. Click the **Export Exceptions** button to export details to a spreadsheet.

- **Warnings Tab:** Lists all warning messages, if any. The Warnings tab lists information additional permissions that might be inherited.

Working with Folders

You can perform the following actions on folders:

Create Folders

Note: You need to be an administrator or have Modify permissions to perform this task. For more information, see Edit Folder Permissions.

To add folders to the Documents folder structure

1. Go to the Project Documents page.
2. Click the **Create Folder** link.
3. To make this a sub-folder, click the **Change Folder** link in the Parent Folder field.
4. On the **Select a folder** dialog box, select the parent folder for this new folder.
5. Complete all necessary fields.
6. Click **Save**.
7. On the Folder Properties window, optionally perform the following actions:
 - Enable Folder for Public Access
 - Edit Folder Permissions
 - Subscribe Yourself to the Folder
 - Subscribe Users to the Folder (Administrators only)
8. Click **Save**.

Move Folders

All folders except the Documents folder can be moved.

To move folders

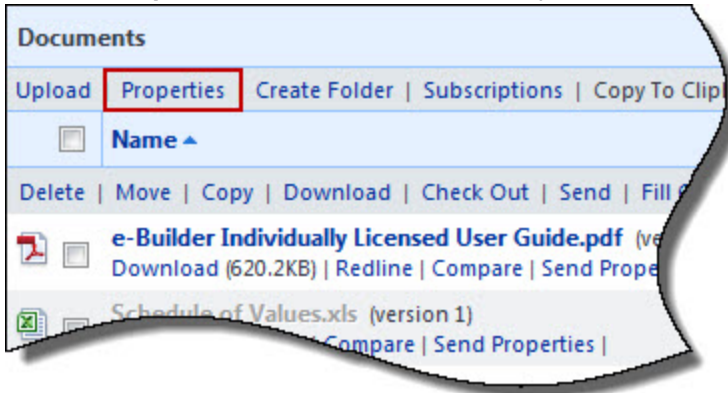
1. Go to the Project Documents page.
2. Click the folder that you wish to move.
3. Click the **Properties** link.
4. On the Folder Properties General Tab click **Move**.
5. Select a destination for the folder.
6. When prompted to confirm, click **OK**.

Enable Folders for Public Access

Administrators have the ability to provide public access to e-Builder folders. Once these settings are established, a public folder URL becomes available for distribution.

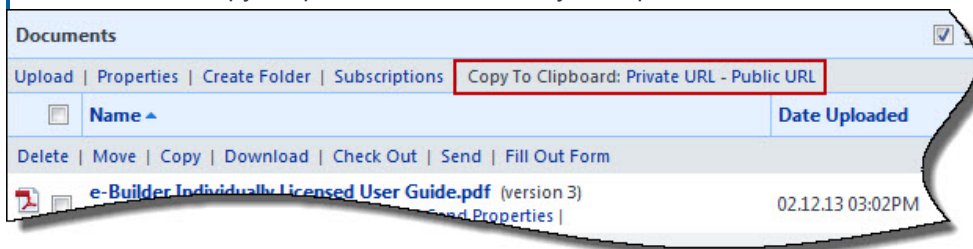
To make a folder public

1. Go to the Project Documents page.
2. Click the name of the folder you want to make public.
3. Click the **Properties** link underneath the folder path.



4. Click the **Public Access Permissions** drop-down arrow and select a public access option. The following options are available:
 - No public access allowed (default selection)
 - Allow access without registration
 - Require registration to access - Select this option to require the recipient of the folder URL to create an e-Builder username and password in order to login to the system. You will then be able to view a list of all registered users by clicking the Folder Properties Public Access History Tab.
5. *Optional:* You can choose to enable sub-folders for public view as well by clicking the **Show public sub-folders on public view** check box.
6. Click **Save**.
7. If you chose to include sub-folders, confirm this change by selecting the **Apply this setting to all sub-folders** check box.
8. Click **Save**.

Note: After the folder is made public, a Public URL link displays in the section underneath the folder name. Click this link to copy the public web address to your clipboard for distribution.



Tip

To view the public web address, click the Properties link. The web address is listed in the Public Folder URL field.

Related Topics:

- Send Public Folder URL to External Users
- Folder Properties - General Tab Page Overview

Send Public Folder URL to External Users

In order for a folder to have a public URL available, it needs to first be enabled for public access. For instructions, see Enable Folders for Public Access.

To send a folder's URL to external project participants

1. Go to the Project Documents page.
2. In the Copy To Clipboard field, click the **Public URL** link.
The URL is copied to your clipboard.
3. Paste the URL (CTRL + V) in the appropriate location for sending.

Related Topics:

- Project Documents Page Overview

Email Enable Folders

Administrators and users with Change Permission have the ability to enable folders to receive email messages from both internal and external project participants. Once this setting is configured, an email address is automatically generated for the folder. You are able to view, and if necessary, edit this email address to a unique name. Messages appear in the folder as a .msg extension.

Note: Microsoft Outlook® is required to download and open message files outside of e-Builder Enterprise™. Simply click the message title to open it within the system.



Tip

Set up a folder subscription so that you are notified when an email has been sent to this folder. You will also be notified of all other updates to the folder.

To email enable folders

1. Go to the Project Documents page.
2. Click the folder's **Properties** link.
The Folder Properties - General Tab displays.

- In the **Folder Access Options** field, select the **Allow Email In** check box. Additional options are displayed.
- Select the **Store entire email message** check box to store emails in e-Builder, along with their attachments.

Note: The attachment will still be accessible within the message. If opened in Outlook, it will be an attachment. If opened in e-Builder Enterprise™, it can be accessed from the Attachments tab

- Select the **Store attachments separately** check box to save attachments as a separate file within the folder.

Note: This option stores the attachments only. The email message file is not retained.

- The default email address is displayed in the **To send e-mails to this folder, use:** field. This field is editable. Change the email address as necessary.
- Click **Save**.

Folder Subscriptions

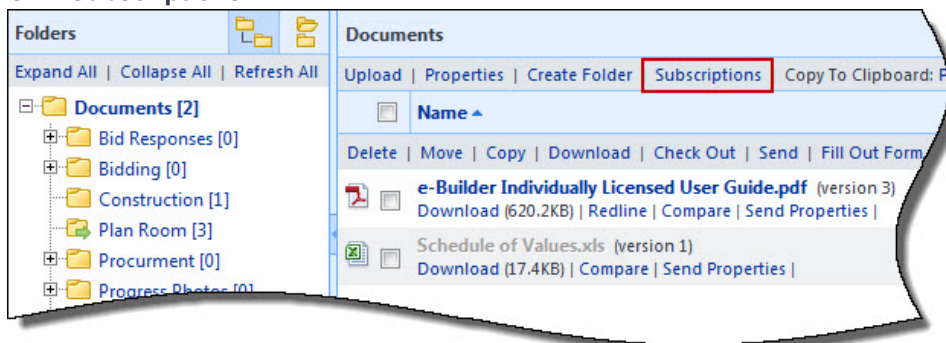
You can perform the following actions on folder subscriptions:

Subscribe Yourself to Folders

Subscribing yourself to a folder allows you to receive email notifications whenever the folder's contents have been updated. If you are an account or project administrator, you can also subscribe account roles, groups or individual users; for more information, see [Subscribe Users to a Folder](#).

To subscribe yourself to a folder

- Go to the Project Documents page.
- Select the folder you want to subscribe to.
- Click **Subscriptions**.



- Select a subscription type.
 - An **instant notification** will send you an email whenever a new file is uploaded to the folder, a new version of a file is created, a file is deleted, or if a file is redlined.
 - A **daily summary** will send you a recap of everything that has happened during the previous day.
- To include subfolders to the subscription, select the **Include Subfolders** check box.

6. Click **Subscribe**.

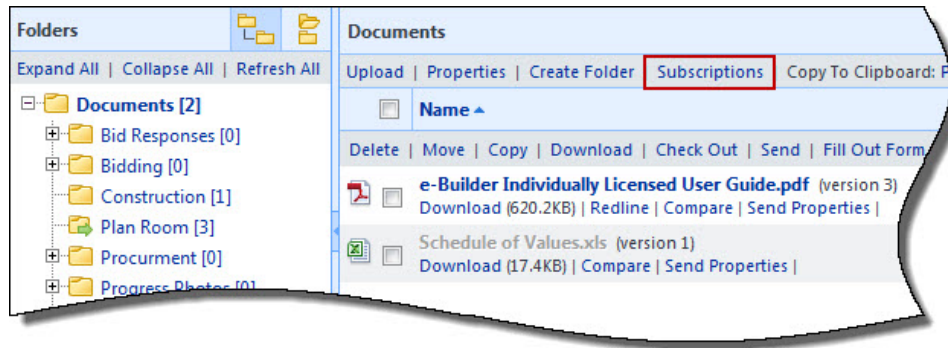
Unsubscribe Yourself From Folders

Note: If your folder subscription was created by an Administrator, only an Administrator can unsubscribe you from the folder. You are able to unsubscribe yourself only if you created the subscription.

To unsubscribe yourself from a folder

1. Go to the Project Documents page.
2. Select the folder you want to unsubscribe from.
3. Click **Subscriptions**.

The Folder Properties popup window displays with the Subscriber tab selected.



4. Select the **Unsubscribe** radio button.
5. To unsubscribe from subfolders as well, select the **Include Subfolders** check box.
6. Click **Unsubscribe**.

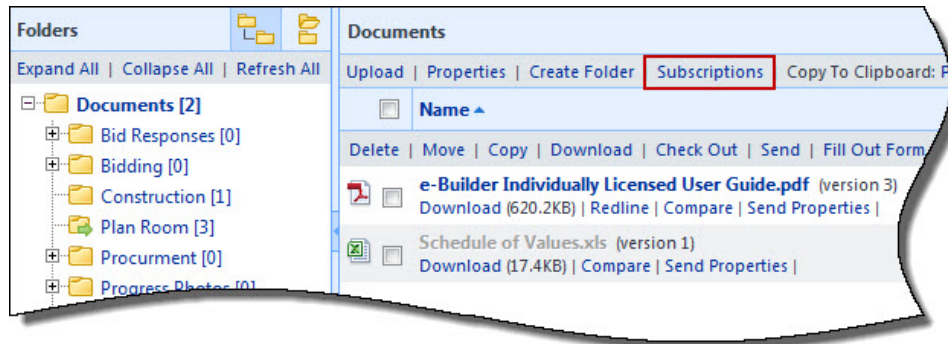
Edit Personal Folder Subscriptions

There are two types of folder subscriptions; instant and daily, and you have the choice to select one or both. Instant subscriptions send an email notification just as soon as there is any activity in folder. Daily subscriptions will send you a daily email. You can also modify the subscription to include or remove subfolders.

To edit folder subscriptions

1. Go to the Project Documents page.
2. Select the folder you want to modify subscriptions for.
3. Click **Subscriptions**.

The Folder Properties popup window displays with the Subscriber tab selected.



4. You can take any of the following actions:

- To change the subscription type, select the **Daily Summary** and/or **Instant Notification** check box.

Note: An instant notification will send you an email whenever a new file is uploaded to the folder, a new version of a file is created, a file is deleted, or if a file is redlined. A daily summary will send you a recap of everything that has happened during the previous day.

- To include subfolders, select the **Include Subfolders** check box.

5. Click **Subscribe**.

Folder Permissions

You can perform the following actions on folder permissions:

View Folder Permissions

Note: You need to be an administrator or have Change Permission privileges to perform this task. For more information, see Edit Folder Permissions.

To view folder permissions

1. Go to the Project Documents page.
2. Click **Folder Permissions** located in the Project Menu.
The Folder Permissions page displays.
3. Navigate to the folder you want to view permissions for.

Export Folder Permissions

Exporting the folder permissions gives you a digital copy that can be distributed, printed, or saved and then modified to be imported back into e-Builder.

To export folder permissions

1. Go to the Project Documents page.
2. From the Project Menu, click **Folder Permissions**.
3. Click **Export**.
The Select Output Type menu displays.

4. Select **Print View** for a printable version of the file, which cannot be imported back into e-Builder.
—Or—
Select **Excel Data Export** for a file version that can be modified and imported back into e-Builder.
5. Click **Export**.

Import Folder Permissions

Folder permissions can be imported to reduce the time it takes to make these changes manually. A template file is available on the Import Folder Permissions page to help you get started. Likewise, you can export the current folder permissions to make the necessary changes and then import this file to update these settings in e-Builder.

Note: The import supports only .xls or .xlsx files.

Below is an example of the headers that should be included in your import file.

	A	B	C	D	E	F	G	H	I	J	K
	Folder Path	Group, Role, or User	View	Download	Redline Markup	Modify	Create	Create Folder	Delete	Change Perms	No Access
2	Fall Lakes \	Accounting	X	X	X	X					
3	Fall Lakes\	Approver	X	X	X	X					
4	Fall Lakes \	Architect	X	X	X	X					
5	Fall Lakes \ 01 Internal Only \	e-Builder Admin	X	X	X	X	X	X	X	X	
6	Fall Lakes\ 01 Internal Only \	Members	X								
7	Fall Lakes \ 01 Internal Only \	Project Manager	X	X	X		X				
8	Fall Lakes \ 01 Internal Only \	Senior Bid Manager	X	X	X	X					
9	Fall Lakes \ 01 Internal Only \ 00 Miscellani	Accounting	X	X	X	X					

To import folder permissions

1. Go to the Project Documents page.
2. From the Project Menu, click **Folder Permissions**.
3. Click **Import**.
The Import Folder Permissions page is displayed.
4. Click **Browse**.
5. Search for and select the import file.
6. Click **Next**.
7. Review the import file summary.
8. If available, review any warnings by clicking the **Warnings** tab.
9. If there are no exceptions, click **Import**.

—Or—

If there are exceptions, click the **Exceptions** tab to review what they are. Make the necessary changes to the import file, and then click **Previous** to import the updated file.

Add Account Roles to Folders

To specify unique permissions for account roles, they must first be added to the folder. The Project Administrator and Project Member groups are added to each folder by default.

Note: You need to be an administrator or have Change Permission privileges to perform this task. For more information, see Edit Folder Permissions.

To add account roles to a folder

1. Go to the Project Documents page.
2. Click the Folder **Properties** link.
3. Click the **Permissions** tab.
4. Click the **Add** link.
5. In the Account Roles section, select the check box next to the account roles you want to add.
6. In the **Select Which Permissions To Grant** section, select the type of access to grant the selected users.
For a description of these access types, see Folder Properties Permissions Tab Overview.
7. Click **Add**.

Tip

Ensure that all users in the selected account role(s) are those that need the permission level that you have granted. To do so, from the Folder Properties - Permissions tab, select the account role, and then click the **List Members** link. A pop-up window displays with a list of the member in the selected account role.

Add Individual Users to Folders

To specify unique permissions for individual users, they must first be added to the folder. The Project Administrator and Project Member groups are added to each folder by default.

Note: You need to be an administrator or have Change Permission privileges to perform this task. For more information, see Edit Folder Permissions.

To add folder permissions for individual users

1. Go to the Project Documents page.
2. Click the Folder **Properties** link.
3. Click the **Permissions** tab.
4. Click the **Add** link.
5. Select the **Show Users** check box.
A filter displays, which allows you to filter for the users you want to add. A list of project users also display, which you can access by scrolling beneath the fold.
6. In the Project Users section, select the check box next to the user(s) you want to add.
7. To set permissions for the user at this time, select the appropriate access type(s) in Select Which Permissions To Grant section. For a description of these access types, see Folder Properties Permissions Tab Overview.
8. Click **Add**.

Edit Folder Permissions

Note: You need to be an administrator or have Change Permission privileges to perform this task.

Folder permissions can only be modified for existing groups and individual users that have been added to the folder.

[To edit folder permissions](#)

1. Go to the Project Documents page.
2. Click **Folder Permissions** located in the Project Menu.
The Folder Permissions page is displayed.
3. Click the **Edit** link next to the folder you want to edit permissions for.
The permission check boxes are enabled.
4. Select the check boxes of the permissions you want to assign and clear the check boxes of the permissions you want to remove.
5. Click the **Save** link.

Tip

Click the folder name to view a description of each permission type. The Folder Properties - Permissions tab displays. You are also able to modify the permissions from this tab. For additional explanation on the permissions levels, see Folder Properties Permissions Tab Overview.

Administrative Tasks

Certain folder management tasks are available only to users with Admin permission.

Folder Permissions Page

Note: You can only update permissions for roles that already have folder access. You cannot add a new user role from this page.

The Folder Permissions page allows you to view and modify permission settings for each folder in the Documents folder structure. Additionally, the entire folder structure can be exported, and then reimported into e-Builder in order to update project folders permissions. From this page, permissions are set for administrators, members, roles or individual users.

To access the Folder Permissions page

Note: Administrators: To grant users the ability to perform this task, give them Change Permissions privileges. For instructions, see Edit Folder Permissions.

1. Go to the Project Documents page.
2. Click **Folder Permissions** located in the Project Menu.

Below is a description of the fields and buttons located on this page.

- **Folder Permissions For:** Click to view folder permissions for a different project.
- **Import:** Imports folder permissions. From here you're able to download a template file.
- **Export:** Exports the current folder structure and permissions. You're able to select from two output types: Print View and Excel Data Export. The print view is more aesthetic and is used for distribution. The Excel Data output can be modified and then imported back into e-Builder.

- **Also apply to files:** Select to apply the folder permissions to the individual files as well.
 - **Warning:** The Apply action is the only way to save changes to folder permissions. If you navigate to another folder without applying changes, a warning message will be displayed. However, if you navigate away from this page, your changes will be lost.
 - After setting the desired folder permissions, click this drop-down arrow to select how to apply the permissions. Choose from the following options:
 - **Apply to folder** - Applies changes to the selected folder only.
 - **Overwrite existing (folder & subfolders)** - Overwrites subfolder permissions to match the selected folder's permissions. This option will remove any conflicts between the selected folder and its subfolders to match the selected folder exactly.
 - **Apply changes (folder & subfolders)** - Select to apply changes only. This option will not overwrite existing permissions - it will only apply changes that you've made to the folder and/or subfolders.
- **Add:** Adds account roles and project groups to the list of roles that has been given permission.
- **Remove:** Removes the selected roles or groups from the list.
- **Group, Role, or User:** This column lists the groups and roles that can be given folder access.
- **View:** Allows users to view the folder and the files within the folder.
- **Download:** Allows users to download files.
- **Redline Markup:** Allows users to redline files and compare documents.
- **Modify:** Allows users to edit the folder name and description. This permission also allows users to move files from the folder.
- **Create:** Allows users to upload files.
- **Create Folder:** Allows users to create sub-folders within the current folder.
- **Delete:** Allows users in the role or user group to delete files and folders, regardless of who created it. Users without delete permission can only delete the files that they uploaded. Allows Document Owners to delete their own files in that folder. They cannot delete other files or the folder itself.
- **Change Perms:** Allows users in the selected role to change folder permissions.
- **No Access:** Select to override all other permissions. If someone is in two roles and one of the roles has this permission, selecting this check box will override all other role permissions for the user.

Add Account Roles to Folders

To specify unique permissions for account roles, they must first be added to the folder. The Project Administrator and Project Member groups are added to each folder by default.

Note: Administrators: To grant users the ability to perform this task, give them Change Permissions privileges. For instructions, see Edit Folder Permissions.

To add account roles to a folder

1. Go to the Project Documents page.
For instructions, see [Access Project Documents Page](#).
2. Click the Folder **Properties** link.
The Folder Properties General Tab displays.
3. Click the **Permissions** tab.
The folder's permission settings displays.
4. Click the **Add** link.
The Add Permissions window displays.
5. In the Account Roles section, select the check box next to the account roles you want to add.
6. In the Select Which Permissions To Grant section, select the type of access to grant the selected users.
For a description of these access types, see [Folder Properties Permissions Tab Overview](#).
7. Click **Add**.

Tip

Ensure that all users in the selected account role(s) are those that need the permission level that you have granted. To do so, from the Folder Properties - Permissions tab, select the account role, and then click the **List Members** link. A pop-up window displays with a list of the member in the selected account role.

Related Topics:

- [Add Individual Users to Folders](#)
- [Edit Folder Permissions](#)

Add Individual Users to Folders

To specify unique permissions for individual users, they must first be added to the folder. The Project Administrator and Project Member groups are added to each folder by default.

Note: Administrators: To grant users the ability to perform this task, give them Change Permissions privileges. For instructions, see [Edit Folder Permissions](#).

To add folder permissions for individual users

1. Go to the Project Documents page.
For instructions, see [Access Project Documents Page](#).
2. Click the Folder **Properties** link.
The Folder Properties General Tab displays.
3. Click the **Permissions** tab.
The folder's permission settings displays.
4. Click the **Add** link.
The Add Permissions window displays.
5. Select the **Show Users** check box.

A filter displays, which allows you to filter for the users you want to add. A list of project users also display, which you can access by scrolling beneath the fold.

6. In the Project Users section, select the check box next to the user(s) you want to add.
7. To set permissions for the user at this time, select the appropriate access type(s) in Select Which Permissions To Grant section.

For a description of these access types, see Folder Properties Permissions Tab Overview.

8. Click **Add**.

Related Topics:

- Add Account Roles to Folders
- Edit Folder Permissions

Edit Folder Permissions

Folder permissions can only be modified for existing groups and individual users that have been added to the folder. For instructions on adding users to the folder, see the Related Topics section below.

To edit folder permissions

1. Go to the Project Documents Page.
2. On the Project menu, click on the **Folder Permissions** link.
The Folder Permissions page is displayed.
3. Click the name of the folder you want to edit permissions for. The permission check boxes are displayed on the right side.
4. Select the check boxes for the permissions you want to assign and clear the check boxes of the permissions you want to remove.
5. Click the **Apply** button.

Tip

Click the folder name to view a description of each permission type. For additional information on the permissions levels, see Folder Properties Permissions Tab Overview.

Related Topics:

- Add Account Roles to Folders
- Add Individual Users to Folders

Subscribe Users to Folders

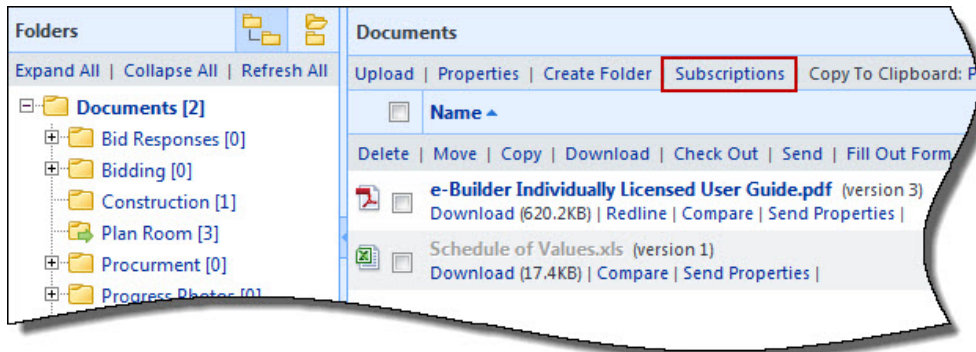
Subscribing to a folder enables users to receive email notifications whenever the folder's contents have been updated. Account and project administrator have the ability to subscribe account roles, groups and individual users.

To subscribe users to a folder

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.

2. Select the folder you want to subscribe the user to.
3. Click **Subscriptions**.

The Folder Properties popup window displays with the Subscriber tab selected.



4. Select the account roles, groups or individual users you'd like to subscribe, and then click the right arrow to add them to the Selected Subscribers box.
5. Select a subscription type.
 - An **instant notification** will send you an email whenever a new file is uploaded to the folder, a new version of a file is created, a file is deleted, or if a file is redlined.
 - A **daily summary** will send you a recap of everything that has happened during the previous day.
6. Select the **Include Subfolders** check box to add subfolders to the subscription.
7. Click **Subscribe**.

Related Topics:

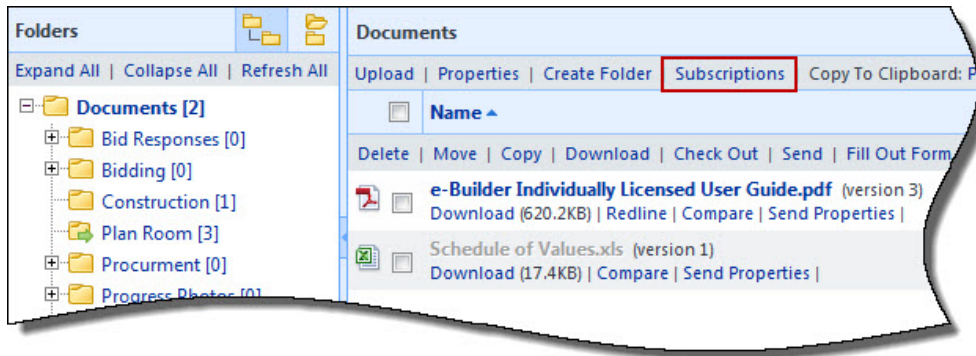
- Unsubscribe Users From Folders
- Edit Folder Subscriptions for Users

Unsubscribe Users From Folders

Note: If you create folder subscriptions for your team members, only yourself and other administrators will have the ability to unsubscribe those users; team members will not be able to unsubscribe themselves.

To unsubscribe team members from a folder

1. Go to the Project Documents page.
For more information, see Access Project Documents Page.
2. Select the folder you want to unsubscribe users from.
3. Click **Subscriptions**.
The Folder Properties popup window displays with the Subscriber tab selected.



4. Select the **Unsubscribe** radio button.
5. In the **Subscribers** section, select the check box next to the account roles, groups or individual users you'd like to unsubscribe.
6. To unsubscribe from subfolders as well, select the **Include Subfolders** check box.
7. Click **Unsubscribe**.

Related Topics:

- Unsubscribe Users From a Folder
- Edit Folder Subscriptions for Users

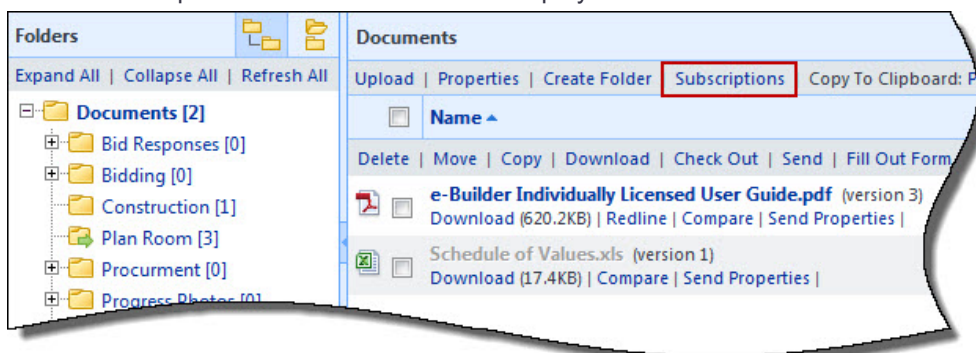
Edit Folder Subscription for Users

There are two types of folder subscriptions; instant and daily, and you have the choice to select one or both. Instant subscriptions send an email notification just as soon as there is any activity in folder. Daily subscriptions will send you a daily email. Additional modifications can be made by adding/ removing yourself from the subscription, modifying the subscribers list or including/ removing subfolders.

To edit folder subscription for team members

1. Go to the Project Documents page.
For more information, see Access Project Documents Page.
2. Select the folder you want to modify the subscription for.
3. Click **Subscriptions**.

The Folder Properties Subscriber window is displayed.



4. You can take any of the following actions:
 - To subscribe yourself, select the **Subscribe Myself** check box.
 - To add or remove groups, roles or individuals, click the appropriate directional arrow to move users to the appropriate box.
 - To include subfolders, select the **Include Subfolders** check box.
 - To change the subscription type, select the **Daily Summary** and/or **Instant Notification** check box.

Note: An instant notification will send users an email whenever a new file is uploaded to the folder, a new version of a file is created, a file is deleted, or if a file is redlined. A daily summary will send a recap of everything that has happened during the previous day.

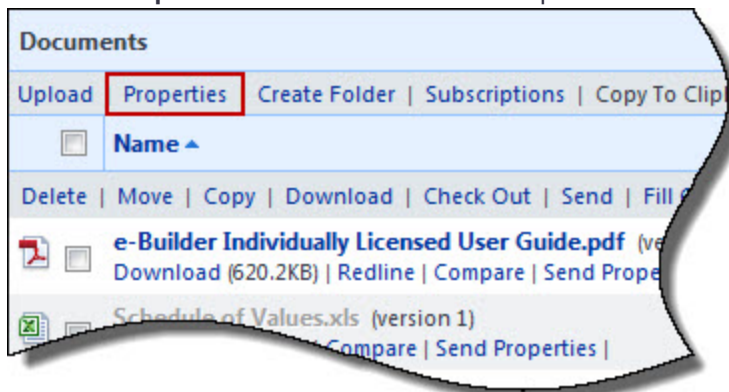
5. Click **Subscribe**.

Restore Deleted Documents & Folders

When users delete folders or documents, they are not permanently removed from the system and can be restored by anyone with administrative permissions.

To restore deleted files and folders

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. Click the **Properties** link underneath the folder path.



The Folder Properties window displays.

3. Click the **Recycle Bin** tab.
4. Select the check boxes of the files and folders you want to restore.
5. Click **Restore**.

Related Topics:

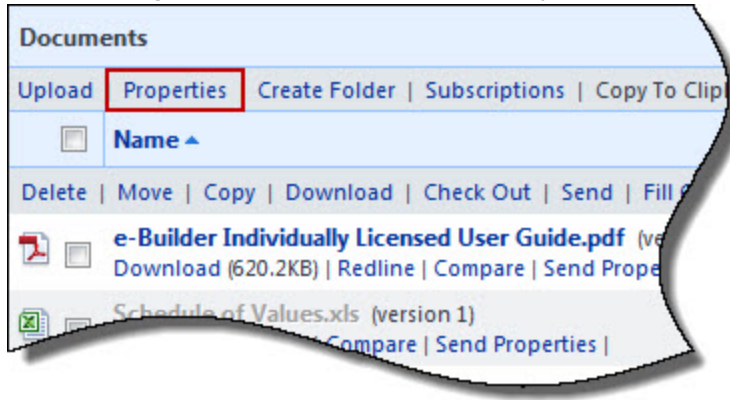
- Find Deleted Documents
- Folder Properties Recycle Bin Tab Overview

View Access History of Public Folders

Only users with administrative privileges are able to view the access history of public folders.

To view the access history of public enabled folders

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. Click the **Properties** link underneath the folder path.



The Folder Properties window displays.

3. Click the **Public Access History** Tab.

View Document Access History

Only administrators are able to view a document access history. A document's access history tells you exactly who accessed files including the date and time they were opened.

To view a document's access history

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. In the Project Menu, click **Access History**.
The Access Document History page displays.
3. Filter for file(s).

Tip

To view all files, do not add any filter criteria and click Filter.

4. *Optional:* You can also export the document access history log to an Excel™ spreadsheet by clicking the Excel icon.

Related Topics:

- Access Document History Page Overview

View/Export Document Log

Only administrators are able to view and export the document log. The following is a list of data included in the document log:

- Folder path
- File name
- File size
- User that uploaded the file
- Redline Counter and link to redlined file
- User that currently has the file checked out
- Date file was checked out
- Link to a list of items the file is attached to

To view or export the document log

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. In the Project Menu, click **Document Log**.
The Document Log page displays.
3. To export these records, click **Export**.
The Select Output Type submenu displays.
4. Choose from one of the following options:
 - Excel Data Export
 - CSV Data Export
 - Tab Delimited Text
5. Click **Export**.

Related Topics:

- Document Log Page Overview

Find Deleted Documents

Only users with administrative permissions are able to search for deleted documents.

To find deleted files

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. In the Project Menu, click **Find Deleted Documents**.
The Find Deleted Documents window displays.
3. In the **Search for** field, enter the name of the file, include the file extension, that you want to search for.
4. Narrow your search by selecting one or more of the Search in options.
5. Click **Search**.

Related Topics:

- Delete Documents
- Restore Deleted Documents and Folders
- Find Deleted Items Page Overview

Update Folder Custom Fields

Only users with administrative permissions can perform this task. Updating folder custom fields enable folder contents to automatically inherit the custom field values of the parent folder.

Note: In order to tag documents with custom fields, the administrator must enable account level document control and establish document custom fields per document type. The individual project must also have project level document control enabled.

When all of these settings are in place, users will be automatically prompted to complete the document custom fields every time they upload a file to the Documents module. Tagging documents cannot be required, and users can bypass the custom field assignment.

To update folder custom fields

1. Go to the Project Documents page.
For instructions, see Access Project Documents Page.
2. Click the folder **Properties** link.
The Folder Properties General Tab displays.
3. Click the **Custom Fields** tab. This tab does not display if Project Document Control is not enabled.
4. Select a **Document Type** from the drop-down list. The custom fields that have been defined for this document type will display.
5. Click the custom field drop-down arrow for the values that you want to apply to the new documents uploaded to this folder.
6. Check **Read Only?** if users should not be able to change the value.
7. Check **Apply default values to all files within this folder** to modify existing files in the folder.
8. Click **Save**.

Related Topics:

- About Document Custom Fields
- Update Document Custom Fields
- Review Folder and Document Custom Fields
- Enable Project Document Control

Review Folder and Document Custom Fields

You can view folder and document custom fields by accessing the properties of each individual folder or file. However, to view custom fields for multiple files or folders, it is best to do so from the Document Custom Fields page for a more efficient process.

Note: All users are able to view this page, but only users with administrative privileges are able to view and update folder custom fields. The Custom Fields menu option does not display if the Project Document Control has not been enabled.

To view folder and document custom fields

1. Go to the Project Documents page.
For instructions, see [Access Project Documents Page](#).
2. In the Project Menu, click **Custom Fields**.
The Document Custom Fields page displays.
3. Select the folder or file you want to view custom fields for.
The custom fields display in the content pane.

Note: If you do not see expected files or folders, deselect the **Show untagged files only** option at the top of the folders pane.

4. Optionally, you can make changes to custom field values, and then click **Save** to commit changes.

Related Topics:

- [About Document Custom Fields](#)