

# Documents – Folder Controls Toolbar & Folder Properties

## Documents Module:

1. Select a folder from the expanded or collapsed folder left pane **Folders** tree
2. From the right pane, select **Properties** from the Folder Toolbar.

The screenshot shows the 'Documents' module interface. At the top, there is a navigation bar with buttons for Home, Dashboard, Projects, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, Setup, and a plus sign. Below this is a dropdown menu labeled 'Documents For' with the value '\*Training - MIDET Dialysis Unit (eB Admin)'. On the left, a 'Project Menu' sidebar shows a tree of folders: Documents [15], 01 Project Administration [3], 02 Project Launch [2], 03 Budget and Cost Control [10], 03.01 Master Program Budget [0], 03.02 StrataCap [2], and 03.03 Budget Updates [0]. An arrow labeled '1' points to the '03.02 StrataCap' folder. The main area shows the selected folder 'Documents \ 03 Budget and Cost Control \ 03.02 StrataCap'. A toolbar above the file list contains buttons: Upload, Properties, Create Folder, Subscriptions, and Copy To Clipboard: Private URL - Email Address. An arrow labeled '2' points to the 'Properties' button. Below the toolbar is a table of files:

Name	Version
Paper on Unitformat.pdf	(version 1)
(Budget) Dialysis Sample project with eB conversion 6-25-2012.xls	(version 1)

3. View **General Folder Properties** and share the **Private** or **Public** URL configured for these folders.

Private Folder URL: <https://app.e-builder.net/da2/daLanding.aspx?QS=acf191718c3144f8b77e2c28d67bf517>  
Copy to Clipboard

Public Folder URL: Folder is not public

### Folder Properties - General

General History Permissions Subscribers Recycle Bin

4. Email In folder has its own unique email address

### Folder Access Options:

To send e-mails to this folder, use:  
Training\_-\_MIDET\_Dialysis\_Unit\_eB\_Admin.03.02\_StrataCap @docs.e-builder.net

5. View the **History** details within this folder

General History Permissions Subscribers Recycle Bin

Folder History Cancel

Name	Company	Timestamp	Access
Sofia Wilson	Ascension Health	05.02.14 06:20PM	Create

Select General Tab for General Folder Properties

6. View **Permissions** to see which role has which permissions to this folder; View/Download/Redline/Modify/Create/Delete

7. Select **Subscribers** tab to subscribe yourself or another role to a folder (\*if permissions are granted for your login)

8. Did someone delete a file? If so, you will see it listed in the **Recycle Bin** tab

General History Permissions Subscribers Recycle Bin

6 7 8

## Documents Module:

### To subscribe yourself to a folder:

1. Select **Subscriptions** from the **Folder Controls** Toolbar. Subscribing yourself to a folder allows you to receive email notifications whenever the folder's contents have been updated.
2. The **Folder Properties - Subscription** window displays.
3. Select a **Subscription Type**.
  - a. A **Daily Summary** will send you a recap of everything that has happened during the previous day.
  - b. 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.
4. To include subfolders to the subscription, select the **Include Subfolders** check box.
5. Click **Subscribe**.

## Folder Properties - Subscriptions 2

General
History
Permissions
Subscribers
Recycle Bin

Subscribe
Cancel

Action:  Subscribe  Unsubscribe  Modify Subscription Type

Subscription Type:  Daily Summary  Instant Notification ?

Include Subfolders:  ?

Subscribe
Cancel

3
4
5
1

Recent Pages...

### Project Menu

- > Details
- > Forms
- > Issues

## Documents For \*Training - MIDET Dialysis Unit (eB Admin)

### Folders

Expand All | Collapse All | Refresh All

- Documents [15]
  - 01 Project Administrator
  - 02 Project Launch [2]
  - 03 Budget and Cost Control
    - 03.01 Master Program
    - 03.02 StrataCap [2]
    - 03.03 Budget Update

### Documents \ 03 Budget and Cost Control \ 03.02 StrataCap

Upload | Properties | Create Folder | Subscriptions | Copy To Clipboard: Private URL - Email Address

	Name	
<span style="font-size: x-small;">Delete   Move   Copy   Download   Check Out   Send   Fill Out Form   Compare</span>		
	<b>Paper on Unitformat (1).pdf</b> (version 3)	Download (1.1MB)   Redline (1)   Stamp   Compare With   Send   Properties
	<b>(Budget) Dialysis Sample project with eB conversion 6-25-2012.xls</b> (version 1)	Download (963.0KB)   Redline   Compare With   Send   Properties

## Documents Module:

1. The **File(s) Toolbar** Properties have similar tabs. However, there is an additional tab 'Version' that exists on this toolbar used for version control. Do not rename your files once uploaded to your folder. By keeping the same name, you are able to version the document
2. **Delete** document(s). A popup will display confirmation to delete file
3. **Move** document(s). A popup will display a folder tree for destination folder selection
4. **Copy** document(s). A popup will display a folder tree for destination folder selection
5. **Download**: Select document(s) to download file(s) to your local desktop. Select Save or Open.

**1** Document Controls Toolbar. This toolbar is used for functions relative to all files uploaded to this folder.

**2** Message from webpage  
Delete the selected file(s)?  
OK Cancel

**3** Move To Folder:  
Expand All | Collapse All | Create New Folder  
Documents  
09 Safety  
Ascension Preliminary

**4** Copy to Folder  
Expand All | Collapse All | Create New Folder  
Documents  
09 Safety  
Ascension Preliminary

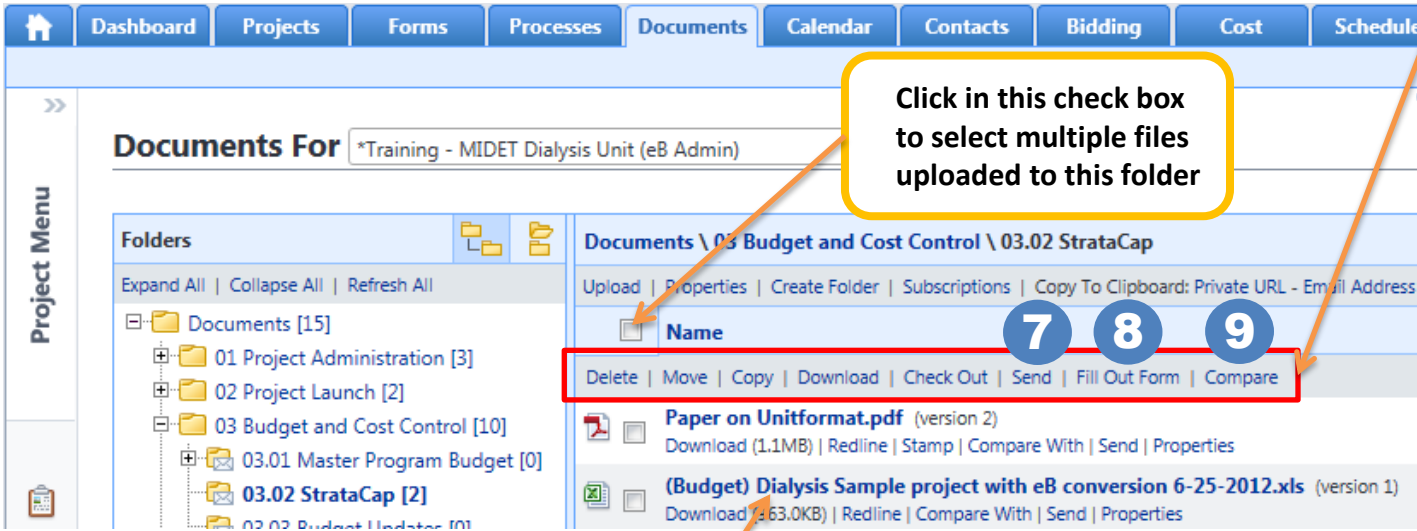
**5** Do you want to open or save **Test document.docx** from **app.e-builder.net**?  
Open Save Cancel

Click in this check box to select multiple files uploaded to this folder

**7** **8** **9**  
Delete | Move | Copy | Download | Check Out | Send | Fill Out Form | Compare

**10** **10. View a File** Click on the file name to view the file in a pop up window. Note: If the file is greyed out, that typically means e-Builder does not have a view for that file type. (e.g. No viewer for .wav files/ sound files)

**6** Delete | Move | Copy | Download | Check Out |  
Paper on Unitformat.pdf (version 2)  
Download (1.1MB) | Redline | Stamp | Com



## Documents Module (Continued):

6. **Check Out** document so nobody else can upload a new version while you are editing
7. **Send** file(s) from here and an email pop-up will appear to send the file to a recipient
8. **Fill Out Form** will permit you to launch and create a form. The file will automatically attach to the form instance.
9. **Compare** files. Upload two documents (MS Word, Excel, etc.), for example, and compare the changes between them

## Documents Module:

1. Click on **Properties** from the **File Toolbar**
2. There are many functions within the **File Properties** such as version control, stamps to jpg or pdf files, redlining tool, download, delete, check out so nobody else can update the files, move, copy, save, and cancel.
3. Rename the file based on the Ascension Health naming convention:

YYYYMMDD\_Location\_Firm\_Document

(e.g. 20140310\_TXAUS\_HKS\_Paper on Unitformat.pdf)

4. Click on the **Versions** tab to view or download previous versions of the file
5. Click on the **Attached To** tab to view what the file has been attached to. (e.g. Safety Form Instance or Budget Change Process Instance).

**1** Click on **Properties** for any uploaded specific file. In Properties, **rename the file** to the company naming convention if not uploaded as such.

**4** **File Properties - General**

**5** **File Toolbar. This toolbar is used for functions relative to all files uploaded to this folder.**

**2** **Many options and functions to use for a specific file.**

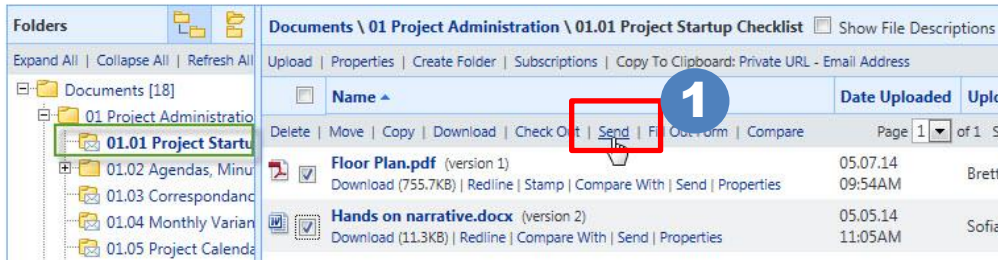
**3**

# Documents – Send Files (Attachments or Links)

## Documents Module:

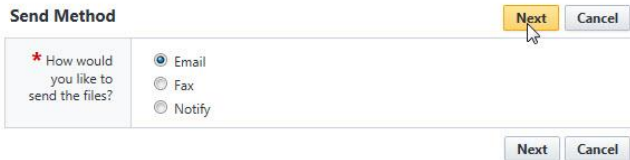
1. Select one or more files to be sent and click **Send**
2. From the **Send File(s)** window select how to send the documents (typically **Email** or **Notify**).
3. Complete all required fields in the **Email File(s)** window. Select *Attachments* or *Links to Download* from the **\*Send Files As** drop-down options.

Documents For \*Training - MIDET Dialysis Unit (eB Admin)

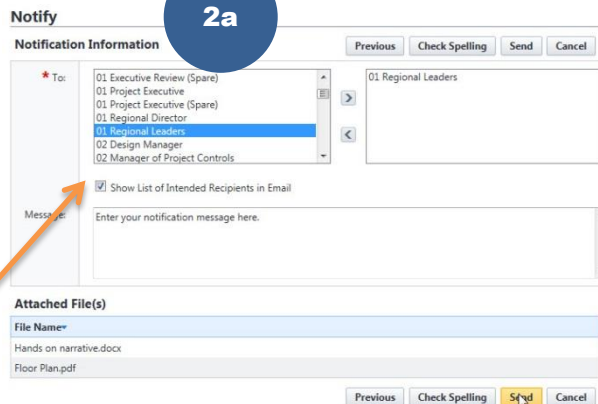


Use the **Links To Download** option if the document(s) might exceed the size limit of the recipient's email

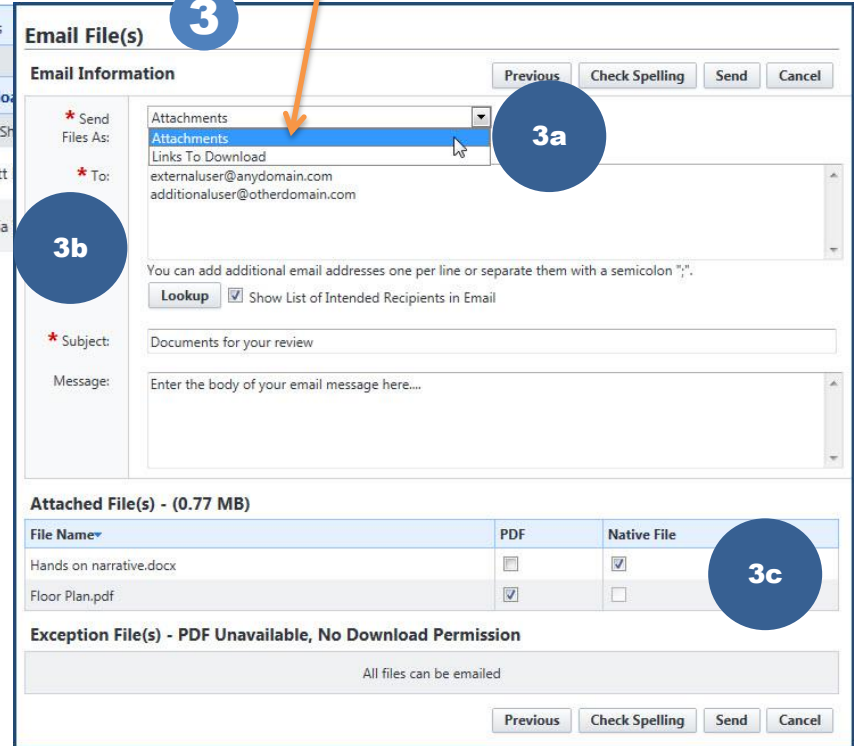
## 2 Send File(s)



2. **Notify**
  - a) Sending a notification does not send the file itself, just a notice that the file is available. Alternatively, utilize the Subscribe feature.



When checked all recipients are displayed in the notification email.

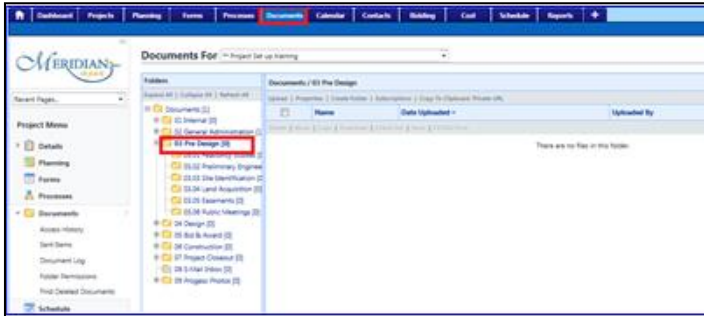


3. **Email File (s):**
  - a) The default **\*Send Files As:** option is *Attachments* which sends the files themselves. Alternatively use *Links to Download* which can be received by any recipient and provides a link to a zip file of the attached documents.
  - b) Complete all required fields (\*). Send to multiple recipients by entering a different email address on each line.
  - c) Indicate if the file(s) is to be sent in its native format or as a PDF.

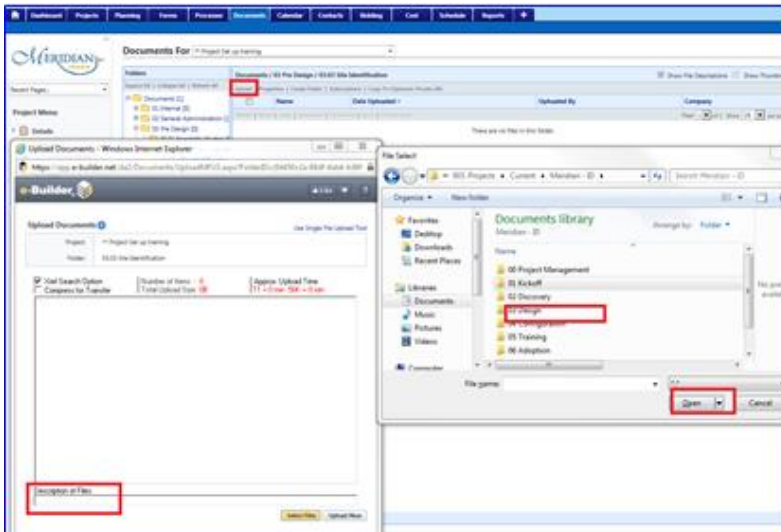
## Uploading

Follow these steps:

1. Go to the **Documents** tab.
2. **Select the name of the project** where the document will be stored
3. **Select the folder** where you want to store the document(s).
4. Click **Upload**



5. Click once on the document upload window to activate it.
6. Click and drag the document(s) you want to upload to the upload window or click Select Files to use the browse function to locate the file(s).
7. (Optional) Enter a description for the file(s) you are uploading
8. Click upload now.



## Downloading

Follow these steps:

1. Go to the **Documents** tab.
2. Select the **name of the project** where the document is stored
3. Select the folder where the document(s) is/are located.

For multiple files:

1. Place a check mark in front of document you want to download.
2. Click download on the menu bar if multiple documents are selected or under the document name if one file is selected.
3. Click open to view the document or click save to save a copy to your computer.

For a single file:

Click Download beneath the filename.



**Redlining Tool:**

1. Click on the name of the folder where the document is stored.
2. Click on the **Redline** link underneath the file name. A new window opens.
3. Click the **Markup Icon** and select **New**.
4. Use the tools on the left-hand side of screen to mark up the file.
5. Click the **Markup icon** again and select **Save As**.
6. Enter the name or initial of your markup and click **OK**.
7. The Redline label now is **Redline (1)**

