# 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.



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 |

**3** Select General Tab for General Folder Properties

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  **4**

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 |

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** |

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**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.**

**2**

**Folder Properties - Subscriptions**

| General | History | Permissions | Subscribers | Recycle Bin |

**Folder Subscriptions**          Subscribe | Cancel

| Action: | ● Subscribe ○ Unsubscribe ○ Modify Subscription Type |

**3** * Subscription Type:     ☑ Daily Summary ☐ Instant Notification [?]

**4** Include Subfolders:     ☑ [?]

**5** Subscribe | Cancel

**1**

**Documents For** [ *Training - MIDET Dialysis Unit (eB Admin) ▾ ]

Recent Pages... ▾

**Project Menu**

> 📋 **Details**

> 📑 **Forms**

> ✅ **Issues**

**Folders**

Expand All | Collapse All | Refresh All

- ☐ 📁 Documents [15]
  - ⊞ 📁 01 Project Administration
  - ⊞ 📁 02 Project Launch [2]
  - ☐ 📁 03 Budget and Cost Cont
    - ⊞ 📁 03.01 Master Program
    - 📁 03.02 StrataCap [2]
    - 📁 03.03 Budget Updates

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

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

| ☐ | **Name** |

Delete | Move | Copy | Download | Check Out | Send | Fill Out Form | Compare

📕 ☐ **Paper on Unitformat (1).pdf** (version 3)
Download (1.1MB) | Redline (1) | Stamp | Compare With | Send | Properties

📗 ☐ **(Budget) Dialysis Sample project with eB conversion 6-25-2012.xls** (version 1)
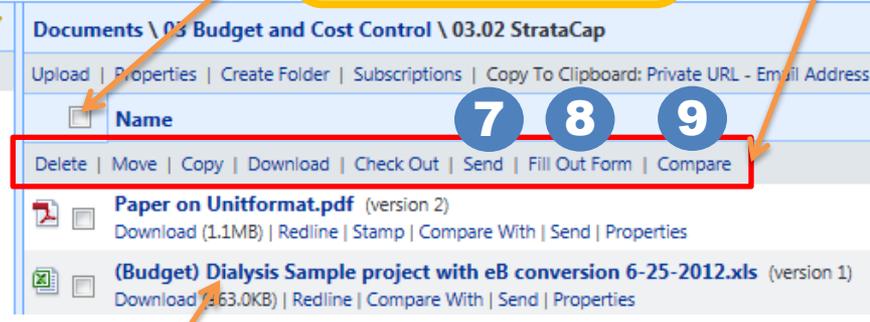Download (963.0KB) | Redline | Compare With | Send | Properties

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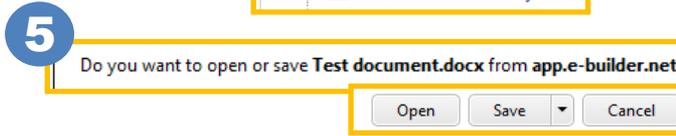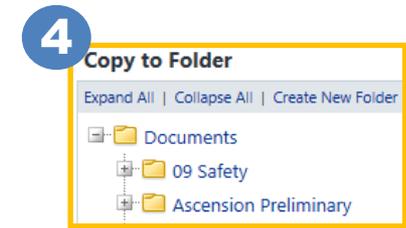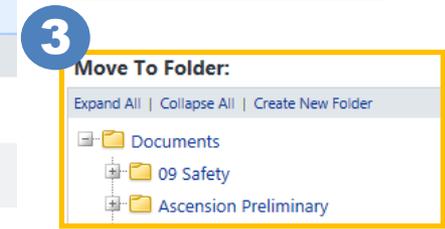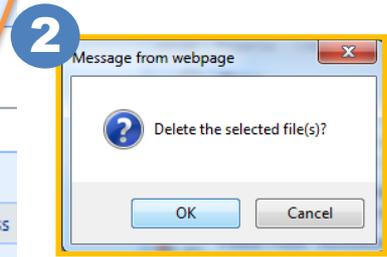
**Click in this check box to select multiple files uploaded to this folder**

**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

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)

**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:

      YYYMMDD_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.



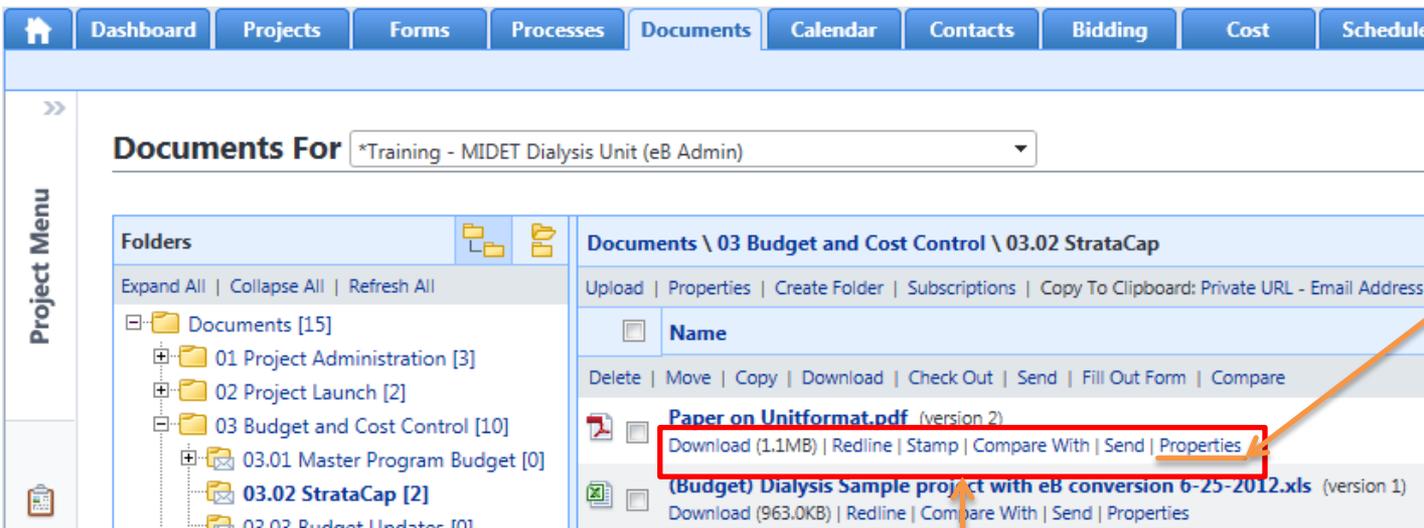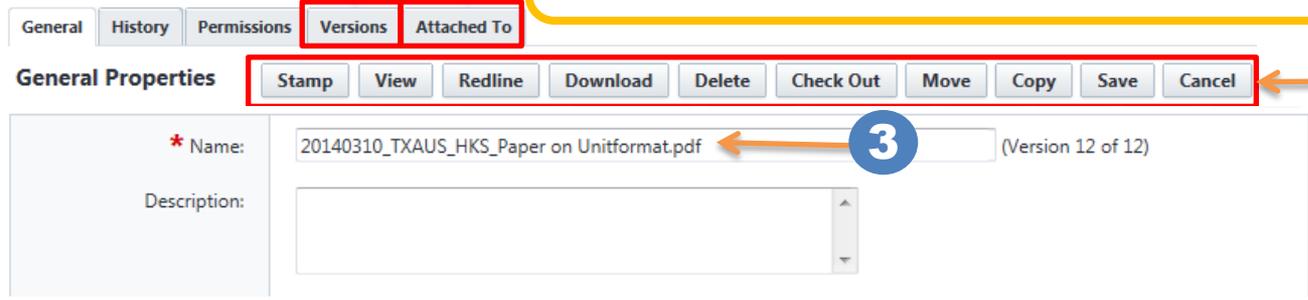**1** Click on **Properties** for any uploaded specific file. In Properties, **rename the file** to the company naming convention if not uploaded as such.

**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.**
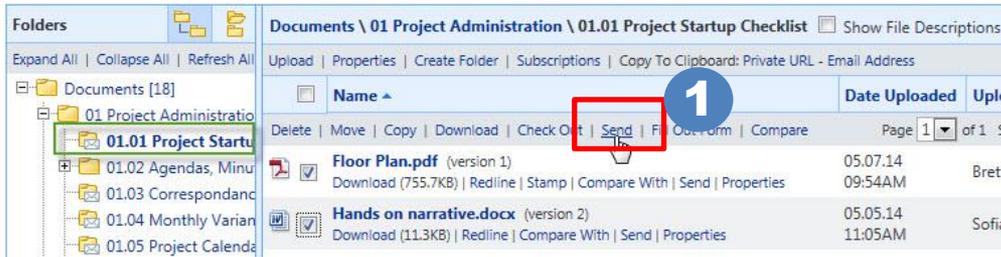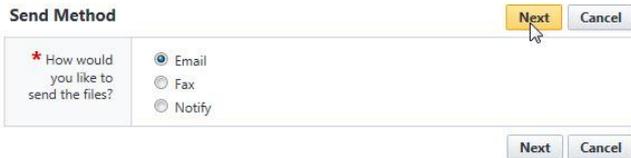
**3**

**e-Builder**

**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.

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

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

**Folders**

Expand All | Collapse All | Refresh All

- Documents [18]
  - 01 Project Administratio
    - 01.01 Project Startu
    - 01.02 Agendas, Minu
    - 01.03 Correspondanc
    - 01.04 Monthly Varian
    - 01.05 Project Calenda

**Documents \ 01 Project Administration \ 01.01 Project Startup Checklist** ☐ Show File Descriptions

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

☐ **Name ▲**  **Date Uploaded**  Uplo

Delete | Move | Copy | Download | Check Out | **Send** | Fi Out Form | Compare    Page 1 ▼ of 1 Sh

**Floor Plan.pdf** (version 1)  05.07.14  Brett
Download (755.7KB) | Redline | Stamp | Compare With | Send | Properties  09:54AM

**Hands on narrative.docx** (version 2)  05.05.14  Sofia
Download (11.3KB) | Redline | Compare With | Send | Properties  11:05AM

**① 1**

**Send File(s)**  **② 2**

**Send Method**  Next  Cancel

* How would you like to send the files?
- ⦿ Email
- ○ Fax
- ○ Notify

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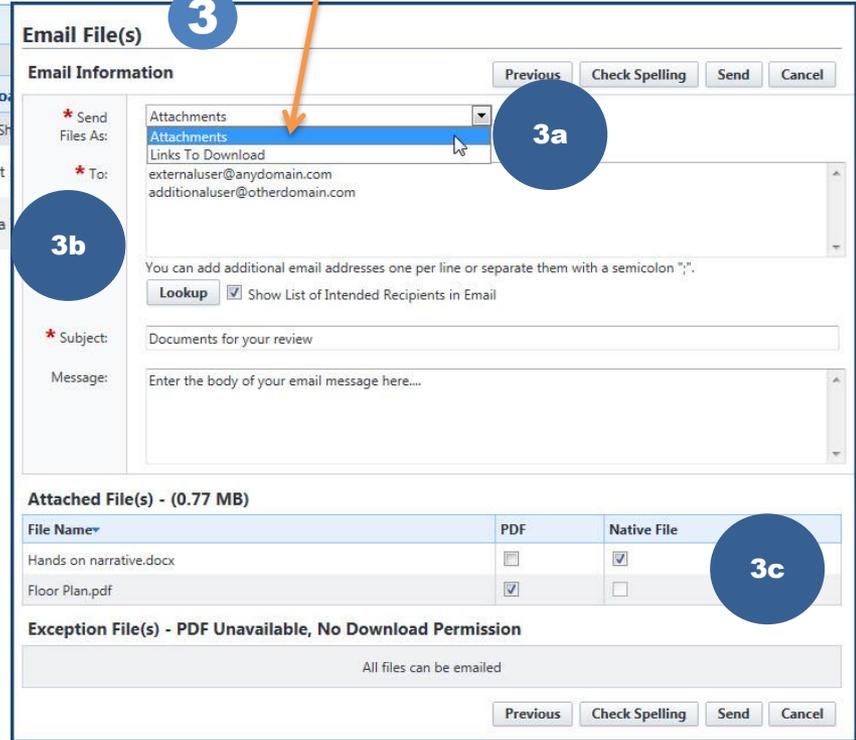
**2. Notify**
a) Sending a notification does not send the file itself, just a notice that the file is available. Alternatively, utilize the Subscribe feature.

**Notify**  **2a**

**Notification Information**  Previous  Check Spelling  Send  Cancel

* To:
01 Executive Review (Spare)
01 Project Executive
01 Project Executive (Spare)
01 Regional Director
01 Regional Leaders
02 Design Manager
02 Manager of Project Controls

01 Regional Leaders

☑ Show List of Intended Recipients in Email

Messa  Enter your notification message here.

**Attached File(s)**

**File Name▼**
Hands on narrative.docx
Floor Plan.pdf

Previous  Check Spelling  Send  Cancel

> When checked all recipients are displayed in the notification email.

**Email File(s)**  **③ 3**

**Email Information**  Previous  Check Spelling  Send  Cancel

* Send Files As:  Attachments ▼  **3a**
  - Attachments
  - Links To Download

* To:  externaluser@anydomain.com
additionaluser@otherdomain.com  **3b**

You can add additional email addresses one per line or separate them with a semicolon ";".
Lookup  ☑ Show List of Intended Recipients in Email

* Subject:  Documents for your review

Message:  Enter the body of your email message here....

**Attached File(s) - (0.77 MB)**

| File Name▼ | PDF | Native File | |
|---|---|---|---|
| Hands on narrative.docx | ☐ | ☑ | **3c** |
| Floor Plan.pdf | ☑ | ☐ | |

**Exception File(s) - PDF Unavailable, No Download Permission**

All files can be emailed

Previous  Check Spelling  Send  Cancel

**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.

# e-Builder® Documents – Uploading & Downloading

| 🏠 | Dashboard | Projects | Forms | Processes | **Documents** | Calendar | Contacts | Bidding | Cost | Schedule | Reports | + |

## 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**
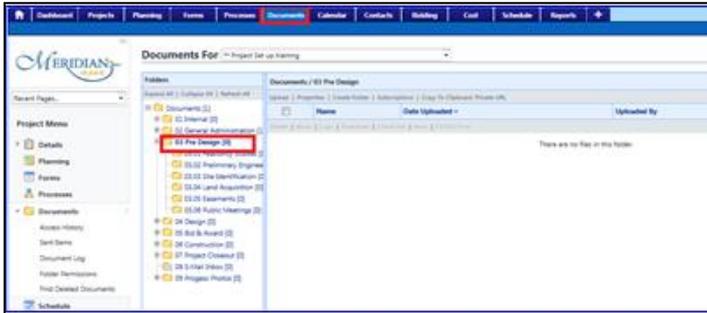


5. Click once on the document upload window to activate it.
6. Click and drag the document(s) you want to upload to the upload window or click Select Files to use the browse function to locate the file(s).
7. (Optional) Enter a description for the file(s) you are uploading
8. Click upload now.
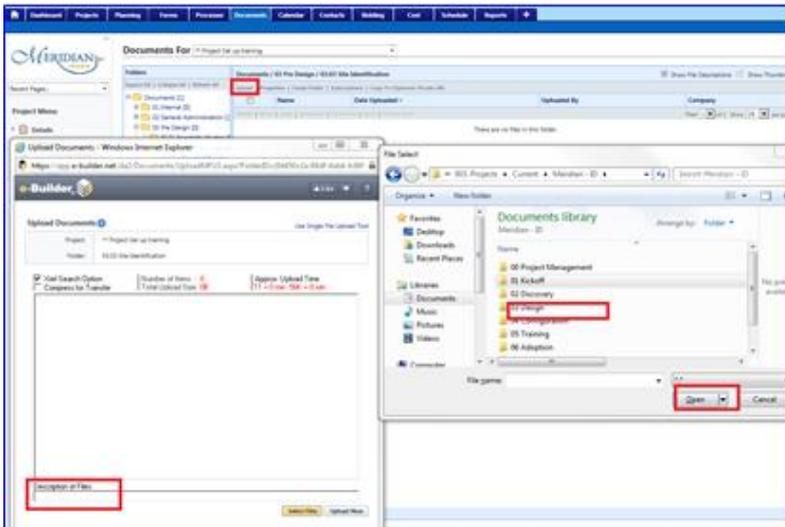


## Downloading

**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.

e-Builder®
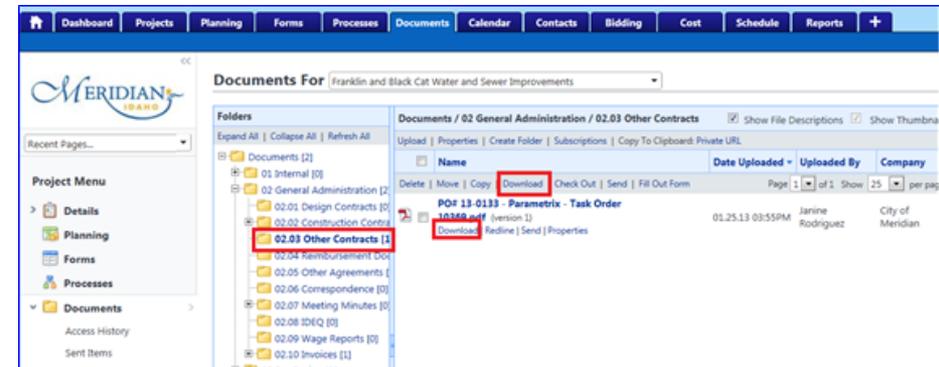
**Redlining Tool:**
1. Click on the name of the folder where the document is stored.
2. Click on the **Redline** link underneath the file name. A new window opens.
3. Click the **Markup Icon** and select **New**.
4. Use the tools on the left-hand side of screen to mark up the file.
5. Click the **Markup 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)**

Delete | Move | Copy | Download | Check Out

**Paper on Unitformat (1).pdf** (versi
Download (1.1MB) | Redline (1) | Stamp |

| Dashboard | Projects | Forms | Processes | **Documents** | Calendar | Contacts | Bidding | Cost | Schedule |

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

**Folders**
Expand All | Collapse All | Refresh All

Documents \ 03 Budget and Cost Control \ 03.02 StrataCap
Upload | Properties | Create Folder | Subscriptions | Copy To Clipboard: Private URL - Email Address

☐ **Name**

Delete | Move | Copy | Download | Check Out | Send | Fill Out Form | Compare

- 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]**
    - 03.03 Budget Updates [0]

**Paper on Unitformat.pdf** (version 2)
Download (1.1MB) | Redline | Stamp | Compare With | Send | Properties

**(Budget) Dialysis Sample project with eB conversion 6-25-2012.xls** (version 1)
Download (963.0KB) | Redline | Compare With | Send | Properties

New
Open...
Save
Save As...

Save As
Please input name:
BP - Elevator
OK | Cancel

New          Ctrl+N
Open...       Ctrl+M
Save         Ctrl+S
Save As...    Ctrl+Shift+S
Close        Ctrl+Shift+C
Open For Review  Ctrl+R
Close Review    Ctrl+Shift+R
Review Changemarks
Review Markup Pages
Consolidate Markups

Renovation

Title | Author | Date
BP - Elevator

Title | Author | Date
BP - Elevator

Title | Author | Date
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Title | Author | Date
5/6/2014 13:36

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