

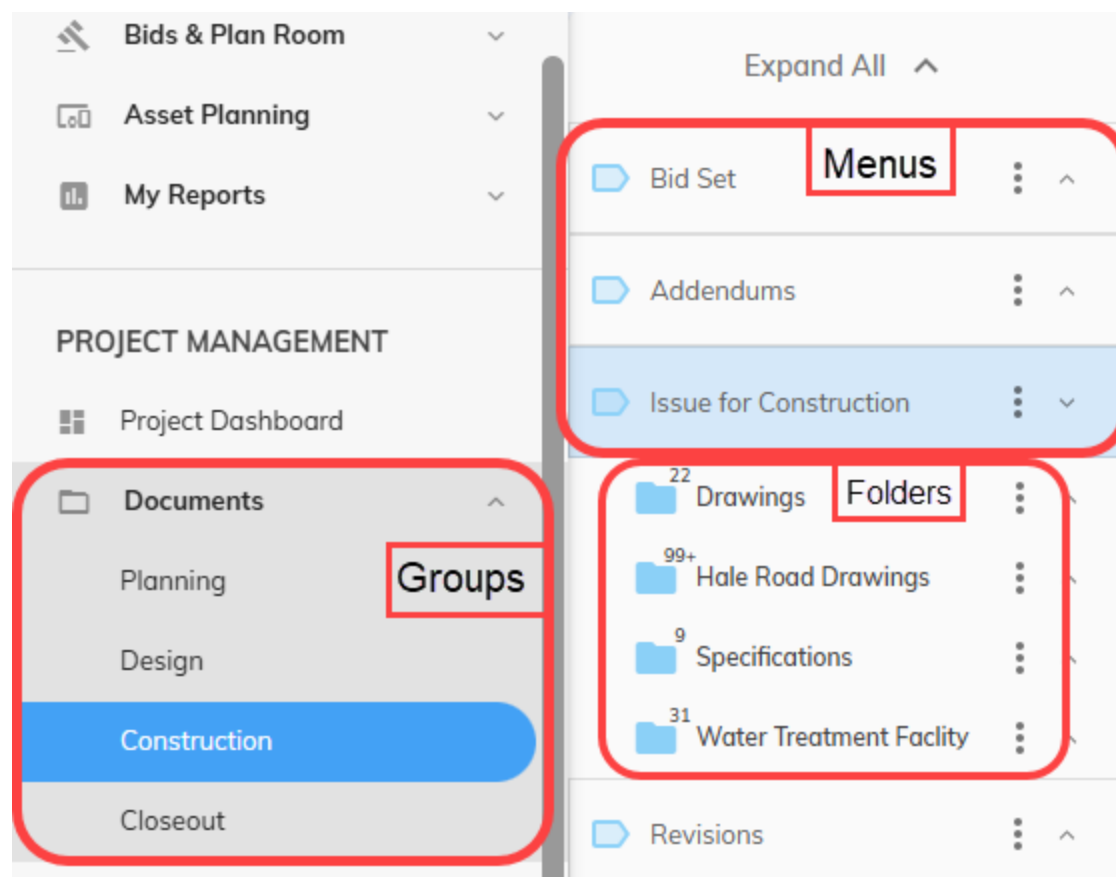
1. What is the Documents Feature?

Projectmates cloud-based document control system is a simple, yet critical module for managing all project-related documents from the planning stage to the closeout of a project. It is collaborative in design and is meant for all parties to work together and share documents with their team members. To support this collaboration, this module features a huge variety of tools and functionalities to help users share, organize, and categorize documents to the benefit of the whole team.

- Simple, straightforward tool to store project documentation and files.
- Many ways to share files with team members, even if they're not Projectmates users.
- Variety of features to notify others and be notified of new files being uploaded.
- Secure access—your organization determines how much a user can see and do within the Document structure.

2. Downloading and Uploading Documents

A project's document control system can be accessed by navigating to the project through the **My Projects** page. Once inside of a project, the Documents tool can be found on the left-side menu by clicking **Documents**.



1. From there, the Documents tool is broken down into three hierarchy levels of **Groups > Menus > Folders**
2. Depending on what level of access you have in the project, only certain groups and menus may be visible to you.
3. Click on a **Group** to view the **Menus** available to you within it. Then, click on a **Menu** to see the **Folders** inside. Finally, click on a folder to start working with its contents.
4. The number next to a folder will tell you how many documents/subfolders are within it, if any.

Once in a folder, there are multiple ways to download and upload documents to these folders.

Downloading Documents

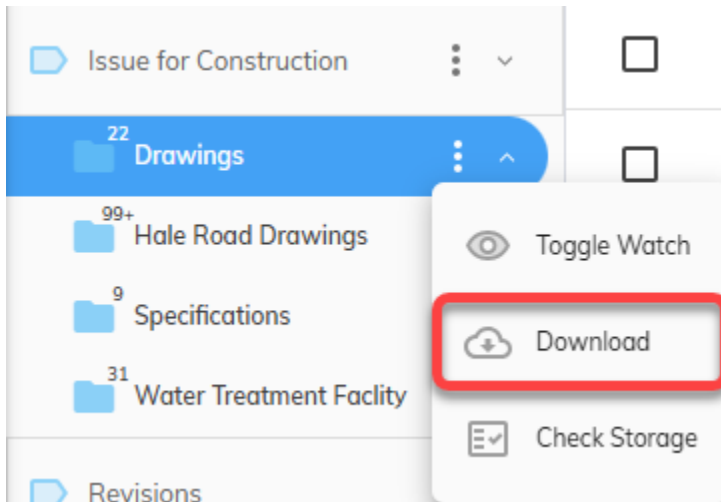
1. The simplest way to download a document is to click on its name.

Construction > Issue For Construction > Drawings			
Expand All ^	☐		Name ↑
Bid Set	☐	PDF	001 Title Sheet.pdf V2
Addendums	☐	PDF	A2.1.pdf V4
Issue for Construction	☐	PDF	A2.2.pdf V2
16 Drawings	☐	PDF	A3.1.pdf V2
10 Specifications	☐	PDF	A3.2.pdf V3
Revisions			

2. By checking the box next to multiple documents, you'll have several new options, including the ability to download all the selected files. The system will automatically zip the files together before downloading them.

-	4 Selected							
☒	⋮	PDF	CD-1.pdf					
☒	⋮	PDF	COM.pdf					
☒	⋮	PDF	Construction Sketch Install.pdf					
☒	⋮	PDF	CS-1.pdf					

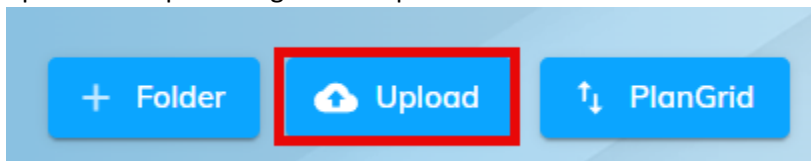
3. Clicking the **three-dot icon** next to a folder or subfolder will give you another option to download the entire folder.



Note: These options only apply for users with appropriate access to download documents.

Uploading Documents

1. The easiest way to upload a document is by dragging and dropping it from your Windows File Explorer or Mac Finder into the browser while a **Folder** is open.
2. The **Upload** button is accessible from the upper-right corner when viewing a folder, gives you more options on top of being able to upload documents.



Upload Documents

☐ Overwrite



Click or Drag Files

Keywords

Label

Select who you want to email

☒ User ☐ Role

Users ▼

Message

Close

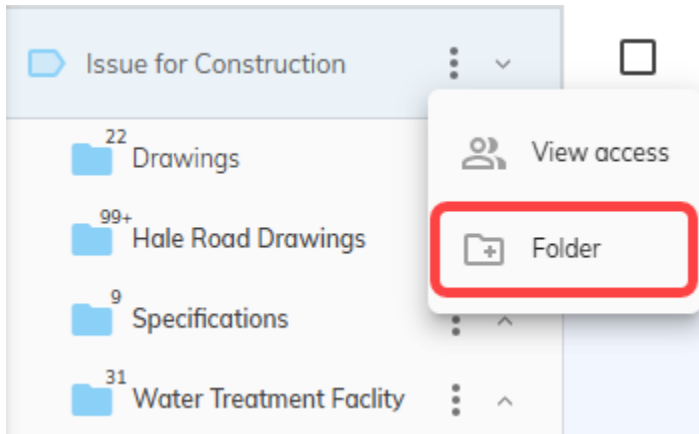
Save

- Use the **Click or Drag Files** area to drag in or select documents from your computer to upload.
- Keywords** and **Label** are optional and can be used to make your document easier to search and categorize.
- Select who you want to email** can be used to notify team members of your upload by selecting either specific users in the project or roles. An email will be sent simultaneously with your upload that notifies them of the upload, where it occurred, and even provides a download link.
- Message** can be used to provide an additional message that is included in your email.
- Once you are ready to upload the document(s), click on the **Save** button.

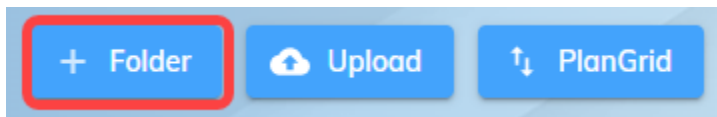
Note: These options only apply for users with appropriate access to upload documents.

3. Creating Folders and Sub-folders

1. **Creating Folders:** You can create a folder by clicking the vertical ellipses located on the right of the **Menu**. Click the **+ Folder** icon to create new folders.



2. **Creating Sub-folders:** To create a sub-folder, be sure you have already clicked into a folder. From here you will be prompted with a few options on the top right of your screen. Click the **+ Folder** from here to create a sub-folder.

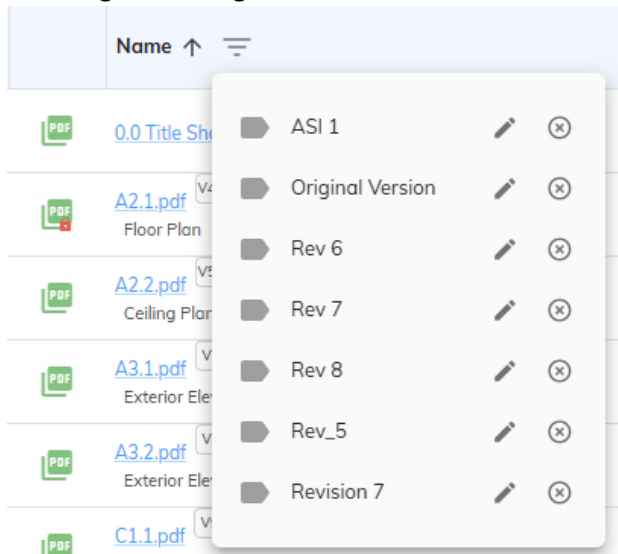


4. Adding Labels and Keywords

Keywords and Labels provide additional ways to organize and search for documents along with their actual name. Keywords display directly underneath the document's name and count towards searches for it.



Documents can be filtered by **Label** by clicking on the **Filter** icon next to the Name column, then selecting an existing label.

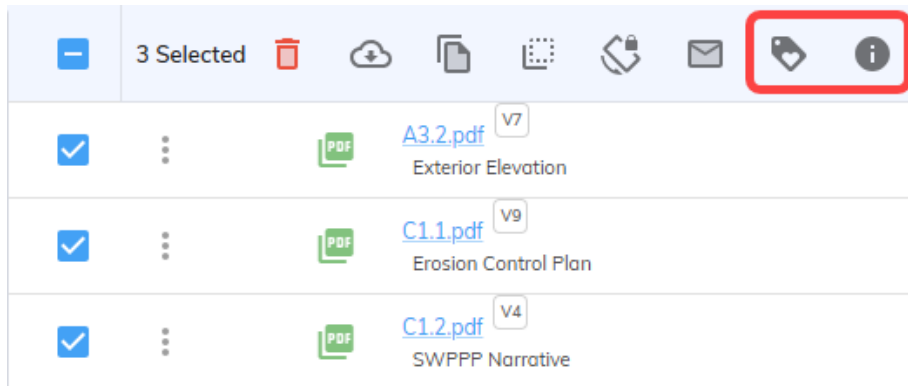


Keywords and labels can be added to documents upon uploading them or afterwards.

- Keywords can be added or modified by clicking the ellipses next to the file, then the **Edit** option.

A screenshot of a dialog box titled 'Edit File or Folder'. It contains two text input fields. The first field is labeled 'Name' and contains the text 'A3.1.pdf'. The second field is labeled 'Keywords' and contains the text 'Exterior Elevation'. At the bottom right of the dialog, there are two buttons: 'Close' and 'Save'.

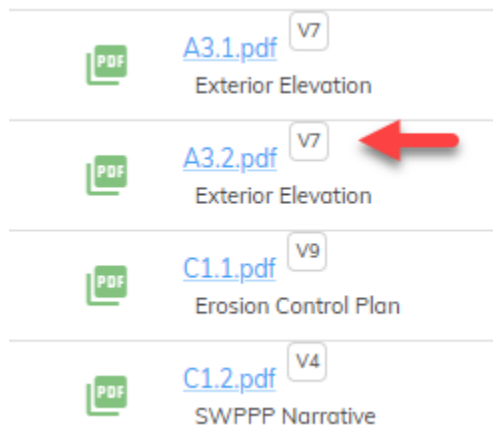
- Labels can be added or modified through the **Add label** button after selecting the item(s).
Note: Keywords and Labels can also be changed for several documents at once.
Check the box next to the documents you wish to edit, then use the **Add label** or **Edit Multiple Keywords** buttons.



5. Downloading or Rolling Back to a Previous Version

Whenever a document is uploaded to a folder and a document with the same name and extension already exists, a new version of the document is created. By default, downloading the document will always download the latest version.

A document with multiple versions will have an icon next to its name denoting what version it is currently on. Clicking on the version icon will open a detailed version history of the document.



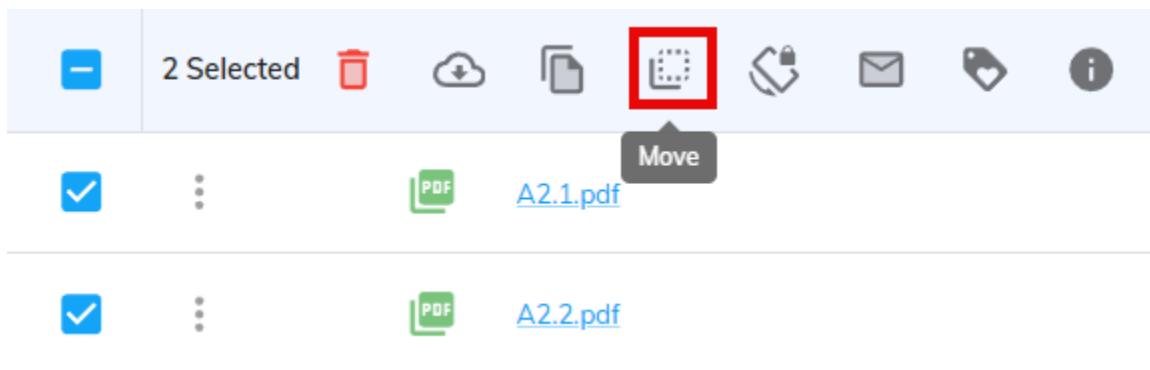
From this window, clicking the **triple dot icon** next to a previous version will provide the option to download, delete, or rollback (delete all versions after this one, making it the latest again) to this version. Keep in mind that your ability to rollback or delete is based on your access rights to this document menu.

A3.1.pdf version(s)

	Version	Size	Added/By	Create Time (CST)
⋮	7	1.5 MB	Marcus Bliss	Mar 13, 2023 04:37 pm
⋮	6	1.5 MB	Marcus Bliss	Feb 17, 2023 10:59 am
⬇ Download	1.5 MB	Marcus Bliss	Oct 20, 2022 10:01 am	
⌛ Rollback				
🗑 Delete	1.5 MB	Marcus Bliss	Aug 24, 2022 11:44 am	

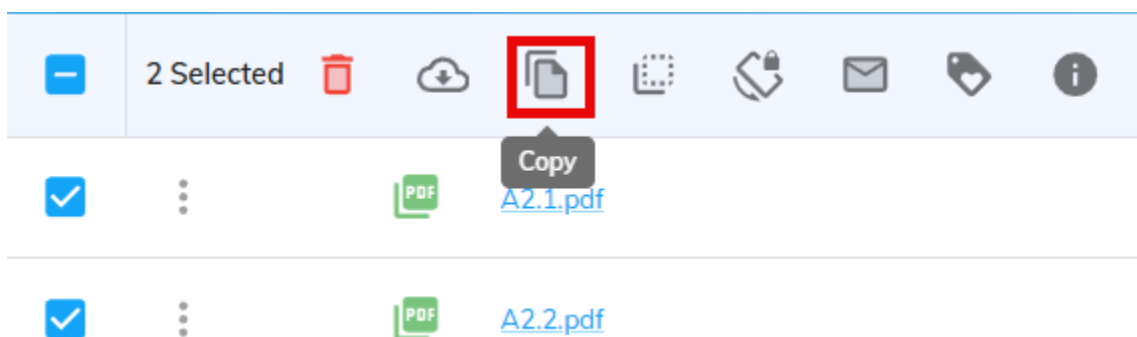
6. Moving Documents

Documents can be moved by selecting the file(s) and clicking the **Move** button located on the top. You will be prompted to pick a **Group > Menu > Folder** path to move this file to.



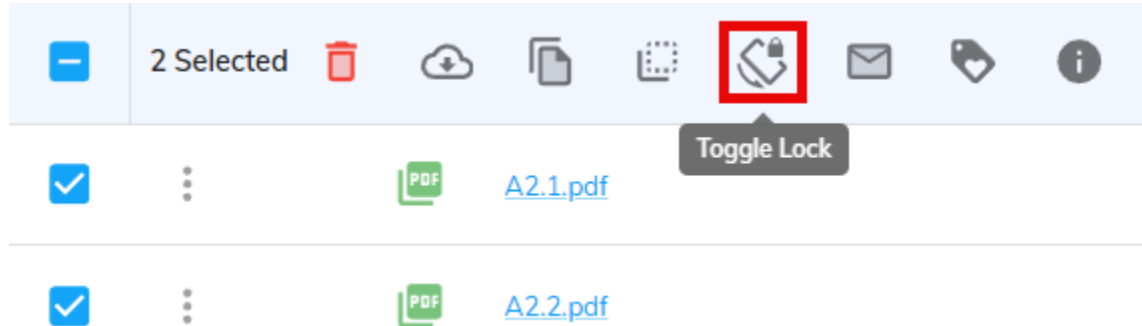
7. Copying Documents

Documents can be copied by selecting the file(s) and clicking the **Copy** button located on the top. You will be prompted to pick a **Group > Menu > Folder** path to copy this file to.



8. Locking and Unlocking

Documents can be locked by selecting the file(s) and clicking the **Toggle Lock** button located on the top. This action can be repeated to unlock the document. Locked documents cannot be deleted, overwritten by a new version, or annotated using the Viewer and Markup tool.



9. Smart Folders

Folders can be designated as Smart Folders, which gives them a unique, partially autogenerated email address. Whenever an email is sent to this address, a new folder is created, and an .EML file containing the email is saved inside that folder.

To do this, click the ellipses to the left of a folder and click the **Edit** button. A partially completed email address will already be populated in this window. Fill in the empty field with any characters to complete the email address, then hit **Save**.

Edit File or Folder

Name

As-Built Drawings

Live2_2705_

Email

textgoeshere

@mail.projectmates.com

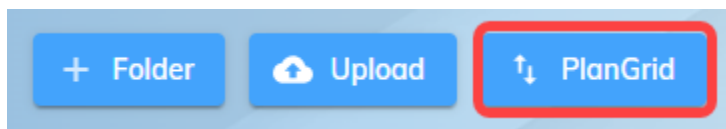
Keywords

Close

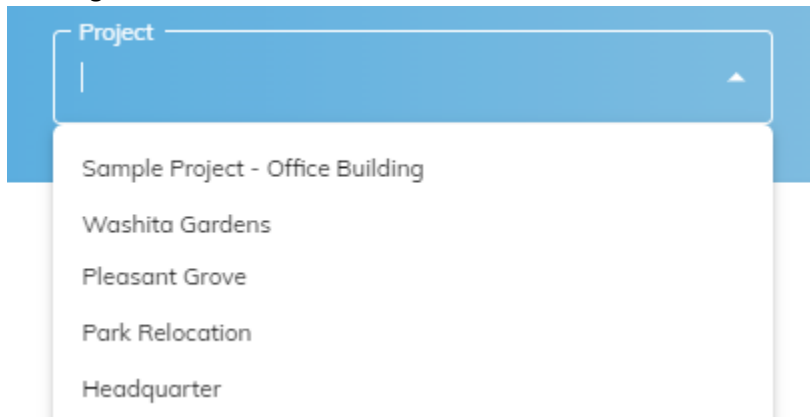
Save

10. Importing Plans from PlanGrid

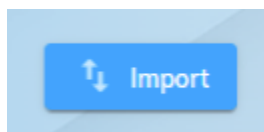
If your Projectmates account is linked to your active PlanGrid account, you can import plans directly from PlanGrid by clicking the PlanGrid button located in the upper-right corner while viewing a folder.



In the new menu, select the PlanGrid project that matches the Projectmates project you are currently working in.

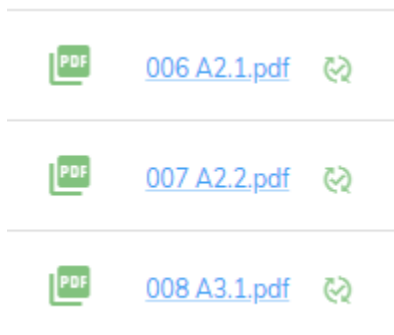


This will generate a list of plans that are tied to your PlanGrid project. Check the box next to the plans you wish to import, click the **Import** button found on the upper right, and Projectmates will import them into the folder where you had previously initiated this process.

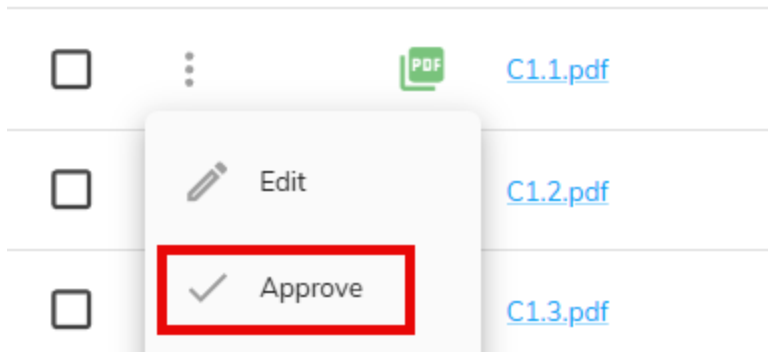


11. Approving a Document or Folder

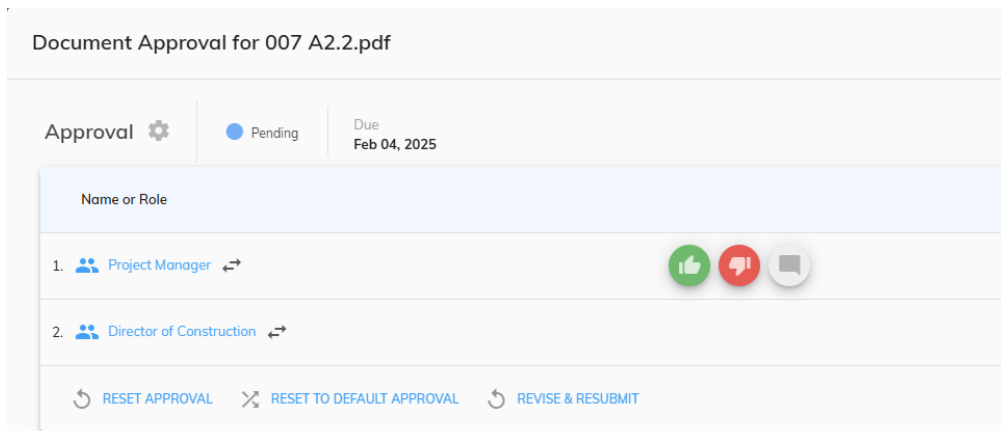
It is possible for documents, or a folder, to be queued for review and approval by project team members. Documents pending approval will have a small icon to the right of the file name. Clicking on it will open a window with the current approval path.



To start an approval process, click the ellipses next to the document or folder you wish to start the process for. Then click the **Approve** button.



If you or your role has been asked to review and approve a document or set of documents...



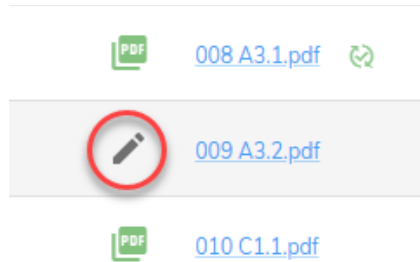
- a. An email notification will be sent requesting your approval.
- b. The approval request can also be accessed from your **My Work** page.
- c. When reviewing documents requesting your approval...
 - i. **Thumbs Up** will approve the document and move it to the next approver, if there is one. If a document has been fully approved, then the user who had initially submitted the document will be notified by email.
 - ii. **Thumbs Down** will reject the document and stop the approval process. You have the option to add a comment on why you had rejected the document. The user who had initially submitted the document will be notified by email.
 - iii. **Revise & Resubmit** will prompt you to give a comment on what needs to be revised, and clicking **Revise & Resubmit** again will undo the approval process. The user who had initially submitted the document will be notified by email with your instructions. **This is typically the preferred option when you want someone to redo a document and send it back to you for approval.**

12. PDF Markups

The PDF Markup tool is an optional feature that your organization may activate for your site. It is a way for you to view and mark up PDF files directly through the system without requiring any 3rd party software to be downloaded.

With this feature active, a PDF file can be opened by hovering over the file and clicking the pencil icon.

Note: This feature is only available if your role has been given the access rights to do so.



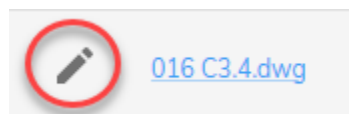
Keep in mind that initially these markups will not be embedded onto the PDF and can only be viewed by others through the PDF Viewer and Markup tool. Clicking the **Download** icon will embed your markups to the latest version of the PDF file itself. The markups will now appear in the PDF even if it is downloaded normally through the Documents.



13. 2D DWG Viewer

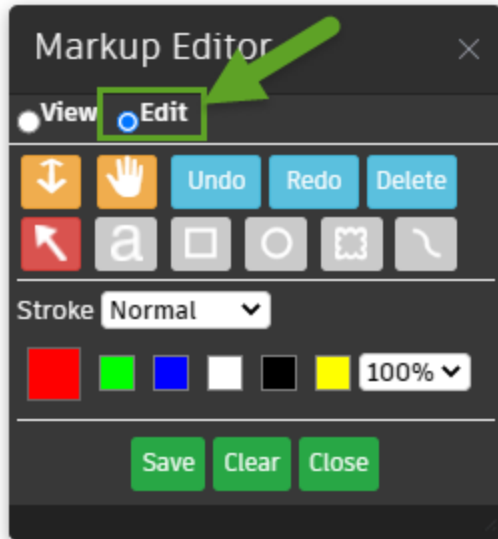
The BIM/DWG Viewer is another optional feature that your organization may activate for your site. It is a way for you to view DWG files directly through the system without requiring any 3rd party software to be downloaded.

Similar to the PDF Markup tool, the BIM/DWG viewer can be opened by hovering over the file and clicking the pencil icon.



If your role has been given the access rights to do so, you can use the Mark Up tool and begin making your edits. Keep in mind that initially these markups will not be embedded onto the DWG file and can only be viewed through the Projectmates BIM Viewer.





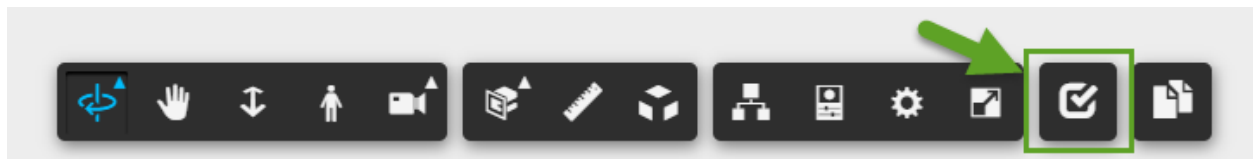
14. 3D RVT Viewer

Similar to the BIM/DWG Viewer, the BIM/3D RVT Viewer is another optional feature that your organization may activate for your site. It is a way for you to view RVT files directly through the system without requiring any 3rd party software to be downloaded.

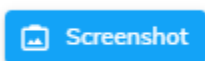
Similar to the other viewers, the BIM/DWG viewer can be opened by hovering over the file and clicking the pencil icon.



If your role has been given the access rights to do so, you can use the Mark Up tool and begin making your edits. Keep in mind that initially these markups will not be embedded onto the RVT file and can only be viewed through the Projectmates BIM Viewer.



15. Snapshot a Drawing View



When viewing a DWG or RVT file through the BIM Viewer, a screenshot of what you are viewing can be quickly taken at any time by using the **Screenshot** button found on the upper right. This will generate a PNG file of your current view and download it onto your PC.