



Files

ProjectTeam contains a file management system to assist the user in efficiently managing project files. Users can quickly upload, download and view files in this system. Files can be quickly uploaded to any form type by using the drag and drop method on the files pane. The User can also create their own folder structure to effectively manage project files. Below are instructions for both accessing form type files and project files.

1. Click the **Files** icon located on the left navigation pane.



2. The Files shared with me pane opens.

Ject Files Form Attachments Halted/Obsolete Files		
ject Files		Upload New Folder
ame	Last Updated	Shared
CSI Codes for Uploading 3 Files	Susan Mills (ProjectTeam, Inc.) 4/16/19 at 11:39 AM	1 8
Documentation Template and Style Guide 3 Files	Susan Mills (ProjectTeam, Inc.) 4/4/19 at 3:20 PM	1 8
Field Definitions and Nomenclature Information 2 Files	Susan Mills (ProjectTeam, Inc.) 4/4/19 at 3:21 PM	1 8
QRGs Approved For Distribution 0 Files	Susan Mills (ProjectTeam, Inc.) 2/26/19 at 2:05 PM	1 8
Report Formula Library 1 Files	Susan Mills (ProjectTeam, Inc.) 4/4/19 at 3:21 PM	1 8
Sample Templates	Susan Mills (ProjectTeam, Inc.)	1 8

3. There are 3 tabs located on the Files pane. Project Files, Form Attachments and Halted/Obsolete Files. Project Files is where the User will upload the folder structure of their choice to store project related files. Form Attachments is where any file uploaded on a form type will be stored. Halted/Obsolete Files is where any file that has be halted or obsoleted (removed from view) file will be stored.

Files shared with me			
Project Files Form Attachments Halted/Obsolete Files			
Project Files			
l⊋		Upload New Folder	
Name	Last Updated	Shared	
CSI Codes for Uploading 3 Files	Susan Mills (ProjectTeam, Inc.) 4/16/19 at 11:39 AM	≜ 8	•
Documentation Template and Style Guide 3 Files	Susan Mills (ProjectTeam, Inc.) 4/4/19 at 3/20 PM	1 8	•
Field Definitions and Nomenclature Information 2 Files	Susan Mills (ProjectTeam, Inc.) 4/4/19 at 3/21 PM	∎ 8	•
ORGs Approved For Distribution 0 Files	Susan Mills (ProjectTeam, Inc.) 2/26/19 at 2:05 PM	1 8	•
Report Formula Library 1 Files	Susan Mills (ProjectTeam, Inc.) 4/4/19 at 3/21 PM	1 8	•
Sample Templates 63 Files	Susan Mills (ProjectTeam, Inc.) S/10/19 at 5x88 PM	1 8	•

4. To upload a folder structure into ProjectTeam, click on the **Project Files** tab, browse to the desired folder structure, click on the parent folder then drag and drop the structure into the bottom panel of the Files shared with me pane.

s shared with me oject Files Form Attachments Halted/	Dbsolete Files	
oject Files / Folder Structure		Share Upload New Folder
ame	Last Updated	Shared
Construction 0 Files	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 10:38 AM	1 1
Design 0 Files	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 10:38 AM	1 1
Warranty O Files	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 10:38 AM	1
	Drag and drop to upload (If dragging folders, the folder structure will be created without the	files)
	Drag and drop to upload (If dragging folders, the folder structure will be created without the	files)

- 5. The entire folder structure uploads. It is important to note, no files contained in the folder structure will be uploaded, only the structure itself.
- 6. To upload files into the folders, click on the desired folder name, browse to the file location, select the files by clicking the file name (select multiple files using the CTRL or Shift), then drag and drop the files into the bottom pane.

Files shared	with me	
Project Files	Form Attachments Halted/Obsolete Files	
Project Files /	Design / Working Documents	Share Upload New Folder
Name	Last Updated	Shared
	(If dragging forward where for der structu	o to upload re will be created without the files)

7. All selected files will be uploaded into the selected folder.

Files shared with me Project Files Form Attachments Halted/Obsolete Files		
Project Files / Design / Working Documents		Share Upload New Folder
Name	Last Updated	Shared
Change Order Request Due v01.doc 29 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 11:31 AM	1
Change Order Request v01.doc 29 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 11:31 AM	1
Contract Execution v01.doc 28 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 11:31 AM	1
Late Contract Execution v01.doc 29 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 11:31 AM	1
Late PCO Quote v01.doc 28 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 11:31 AM	1 1

8. To **Share**, **View**, **Download**, **Upload New Version** or **Copy** any file that has been uploaded, click the dropdown menu to the right of the file name and select the appropriate action. File types that can be previewed include pdf, jpeg, jpg, png, gif and txt.

Files shar Project Fil Project Fil	red with me Form Attachments Halted/Obsolete Files Form Attachments Halted/Obsolete Files / Design / Working Documents		Share Uoload New Folder
Name C	hange Order Request Due v01.doc 9 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 11:31 AM	snared
	hange Order Request v01.doc 9 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 et 11:31 AM	File Information Properties Rename
₩ 2	ontract Execution v01.doc 8 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 11:31 AM	File Actions Share View
	ate Contract Execution v01.doc 9 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 11:31 AM	Download Upload New Version
W 2	ate PCO Quote v01.doc 8 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 11:31 AM	Copy Delete
W 2	ate PCO Request v01.doc 7 KB	Debra Rakes (ProjectTeam, Inc.) 5/13/19 at 11:31 AM	Obsolete

Files that have not been shared with other users can also be **Deleted** using the dropdown menu.
 Files that have been shared can only be **Obsoleted** which moves them to the Halted/Obsolete
 Files tab.

File Information	٦
Properties	
Rename	
File Actions	
Share	
View	
Download	
Upload New Version	
Сору	
Delete	I
Obsolete	L

10. Users can rename files either by using the pencil to the right of the file name or by selecting **Rename** from the dropdown menu.





11. The **Form Attachments** tab contains all files that have been attached to any form type in ProjectTeam. By default a folder is created for all form types (system and custom). As files are attached to any form type the file is stored in the folder created for that form type using the Document Subject as a title for the sub-folder (i.e., A-301 control joint markups.pdf specifications will be located under Form Attachments/Specifications/Steel Decking).

Files shared with me		
Project Files Form Attachments Halted/Obsolete Files		
Form Attachments / Specifications / Steel Decking		Download All New +
Name	Last Updated	
A-301 control joint markups.pdf 422 KB	Greg Blass (Marc Truant & Associates) 4/24/17 at 12:37 PM	*

12. To open the form type record associated with any file on the Form Attachments tab, click the **file name hyperlink** or select **Properties** from the dropdown menu.

Files shared with me		
Project Files Form Attachments Halted/Obsolete Files		
Form Attachments / Specifications / Steel Decking		Download All New +
Name	Last Updated	
A-301 control joint markups.pdf	Greg Blass (Marc Truant & Associates) 4/24/17 at 12:37 PM	File laferenation
		Properties Rename
		File Action View Download
	Drag and drop to upload	Upload New Version
		Obsolete

13. The **Halted/Obsolete Files** tab contains all files that have been halted or obsoleted (removed from view) for the duration of the project. To Unobsolete any file select **Properties** from the dropdown menu to the right of the file.

Files shared with me			
Project Files Form At	tachments Halted/Obsolete Files		
Project Files / Halted and	d Obsolete		
	Name	Last Updated	Shared
Obsolete	Lighthouse.jpg 561 KB	Debra Rakes (ProjectTeam. Inc.) S/22/17 at 12:25 PM	The Information File Information Properties The Actions View
			Download

14. The form type for **Halted and Obsolete** will open. Click the **ellipse button** ... on the top right of the pane and select **Unobsolete**.

Hatted and Obsolete File: Lighthouse.jpg Created By Define Rakes (ProjectTeam, Inc.) on 5/22/17 at 12:25 PM Obsoleta: This document has been marked obsolete. No changes can be made to it.		Download Print - This File View as of Unobsolete
SHARED WITH (1) View All	ACTION ITEMS Show complete/obsolete items	All Files Customize Form Fields
Z DETAILS		

15. The file will return to the **Project Files** original location.

Files shared with me		
Project Files Form Attachments Halted/Obsolete Files		
Project Files / Project Photographs		Share Upload New Folder
Name	Last Updated	Shared
Desert.jpg 845 KB	Debra Rakes (ProjectTeam, Inc.) 5/22/17 at 12:25 PM	1 1
Hydrangeas.jpg 595 KB	Debra Rakes (ProjectTeam, Inc.) 5/22/17 at 12:25 PM	1 1
Jellyfish.jpg 775 KB	Debra Rakes (ProjectTeam, Inc.) 5/22/17 at 12:25 PM	1 1
Lighthouse.jpg 561 KB	Debra Rakes (ProjectTeam, Inc.) 5/22/17 at 12:25 PM	1 1

16. Files contained on the **Form Attachments** that have been obsoleted will not be shown on the Halted/Obsolete Files tab. To restore an Obsolete file that was previously on a form type the user must review the form type in the **View as of...** state, download the obsoleted file from this view then re-upload to the file to form type record after returning to the current view state.