SmartUse

SmartUse Web Portal: Document Management

How to create a project

1. Access SmartUse Web Portal

2. Click on the [+] located in the upper right corner of the page.

3. Enter the name of the project. You can select to copy the folder structure from an existing project from the drop-down menu or leave it empty to create a new folder structure. You will also have the option to select the storage location for your project, a location will be selected by default but can be changed if needed. Next, click "Create project" at the bottom of the window.

4. You will then see your available projects displayed

How to rename a project

1. Select the project you wish to modify

2. At the far right, click the 3 dots and select Modify

Last Updated

02/23/2019 ● ● ●

☐ Edit

🗑 Delete

Download Documents Log

Download Current Set Log

Download As-builts
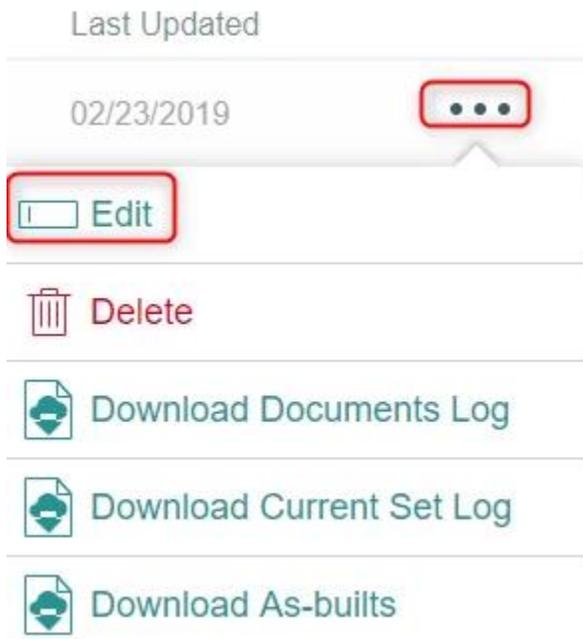
3. Modify the project name as necessary and click **Save**

Edit your project   ✕

Test Project
PROJECT NAME

(UTC-05:00) Eastern Time (US & Canada)   ▾
TIME ZONE

DOCUMENT ORDERING PATTERNS, COMMA-SEPARATED

Save

How to create a folder

1. Click on the project where you wish to create the folder in

2. Click on the folder creation button located in the upper right corner of the page

3. Enter the name of the folder and click "Create folder" on the following window. You will then see you new folder available displayed
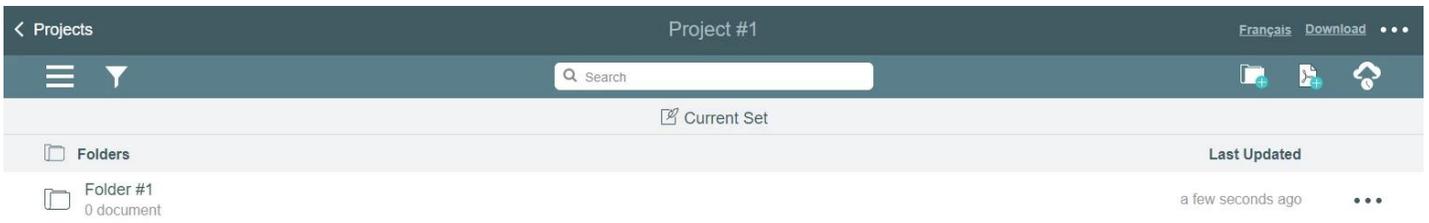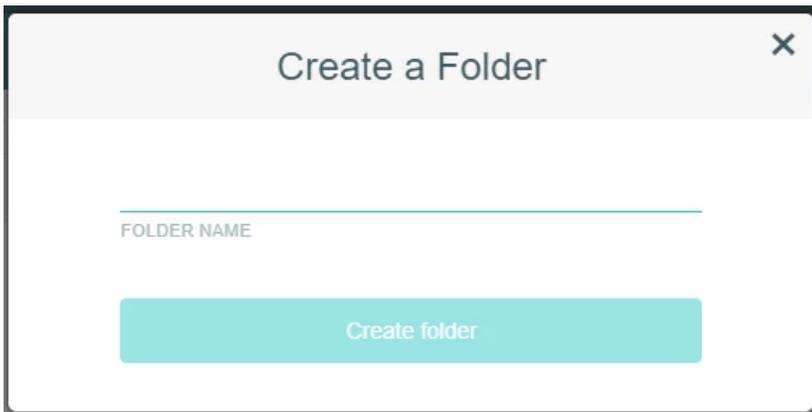
4. Repeat steps 2 to 3 to create as many folders as required. You can repeat those steps within a folder to create new sub-folders.

How to rename a folder

1. Select the project and then folder you wish to rename

2. At the far right, click the 3 dots and select Rename

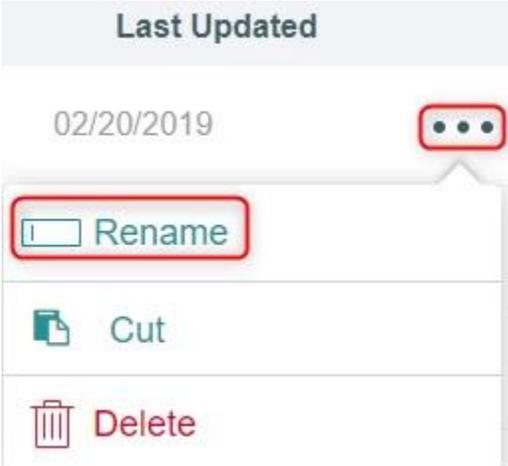**Last Updated**

02/20/2019   ● ● ●

☐ Rename

🗐 Cut

🗑 Delete

3. Rename your folder as necessary and click **Save**

Rename your folder   ✕

1. Drawings

FOLDER NAME

Save

How to copy and paste a folder in the same project

1. Right-click on the folder to cut and do the same to paste it in the desired location of the same project.

☐ Folders

▢ 1. Drawings
   79 documents   Cut

▢ 2. Addendum #1
   1 document   Paste

▢ 3. Specifications
   15 documents

▢ 4. Instructions
   0 document

▢ 5. Shop Drawings
   0 document
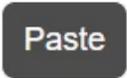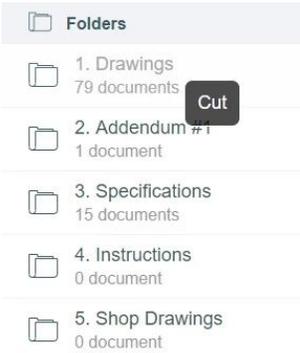
How to upload documents

1. Once you're connected and into the right project and/or folder, you simply have to click in the middle logo located in the upper right corner

2. You will then have the option to upload drawings or documents, once all your documents have been dragged and dropped, click Next

Upload Documents

Choose the type of PDF documents you want to upload:

- **Drawings**
  - ☐ Trim the revision suffix at the end of the sheet name (Ex: A100.00 will be A100)
  - ☐ Use the original PDF document names and do not make any sheet name detection
- ○ **Documents (Shop drawings, Specs, RFIs, Bids, etc.)**
  - ☐ Split the multi-page PDF
  - ☐ Automatically publish the documents

Drag and drop PDFs here

📁 Browse your computer

Next

3. Enter the version information

Version Information
100 %

VERSION NAME   Ex: Initial Set, Addendum #1, etc.

02/25/2019   📅   09:33 AM   🕐

ISSUE DATE

4. Enter revision information, as well as a description or any tags if necessary

Review sheets (Test - 02/10/2020)

🔍 Search   BULK ACTIONS   Tag All Sheets

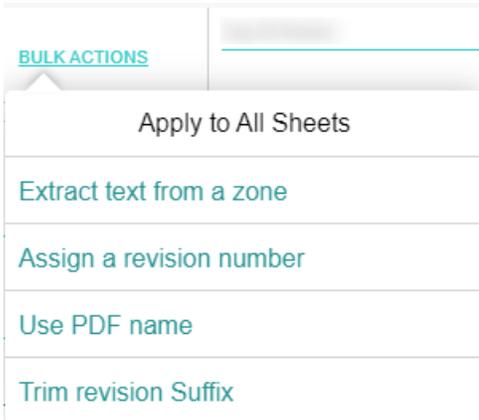Sheet 1 of 1 (A101.pdf)   This sheet will be the revision [0] of A101   Discard

A101

SHEET NUMBER   View the proposed revision list

SHEET TITLE

Original drawing is 4 ft x 50. Do not scale contents of this drawing
Sheet Number
A101

SHEET DESCRIPTION

TAGS

6

5. You can also select bulk options to apply to all pages

BULK ACTIONS

Apply to All Sheets

Extract text from a zone

Assign a revision number

Use PDF name

Trim revision Suffix

6. Once finished, select the users you wish to notify either individually or by clicking Select All then click on Publish at the bottom of the page

Notification

☐ Select All / Unselect All

∨ ☐ 🛡 Administrator

☐ 👤 Jean-François Drouin

☐ 👤 Jeff Drouin

How to upload revisions

1. Access the project and click to upload your documents in the correct folder

2. You will then have the option to upload drawings or documents, once all your documents have been dragged and dropped, click Next

3. If you must use the same version to upload your revised documents, it is recommended to either change the date or the time by one minute. This will ensure that **a new version will be created,** and the old version won't be overridden

Version Information   ✕ 100 %

test 1
VERSION NAME   Ex: Initial Set, Addendum #1, etc.

| 08/28/2019 | 📅 | 8:55 AM | 🕐 |

ISSUE DATE

A new version will be created. ⟵

Don't show this version in the Filter popup on the app ☐

If the same version is used and none of the date or time information is modified, you will see the message in green that this will reuse the existing version information therefore overwriting the current version

Version Information   ✕ 100 %

test 1
VERSION NAME   Ex: Initial Set, Addendum #1, etc.

| 08/13/2019 | 📅 | 8:55 AM | 🕐 |

ISSUE DATE

This will reuse the existing version information. ⟵

4. Once the version information is correct, in the next screen you will be able to use the batch options to detect your sheet titles and numbers as well as ensure that the revision number is correct. **Revisions are automatically incremented based on the previous revision number, if you need to modify the revision number you may do so at this step.**

This sheet will be the revision | 8 | of A000

View the proposed revision list

How to automatically publish documents

1. Click to upload documents

2. Select documents and click to check Automatically Publish Documents

Upload Documents ✕

Choose the type of PDF documents you want to upload:

○ **Drawings**

☐ Trim the revision suffix at the end of the sheet name (Ex: A100.00 will be A100)
☐ Use the original PDF document names and do not make any sheet name detection

● **Documents (Shop drawings, Specs, RFIs, Bids, etc.)**

☐ Split the multi-page PDF
☑ Automatically publish the documents

3. The PDF name of the document will be used as the sheet title and you will be notified by email as soon as they are published
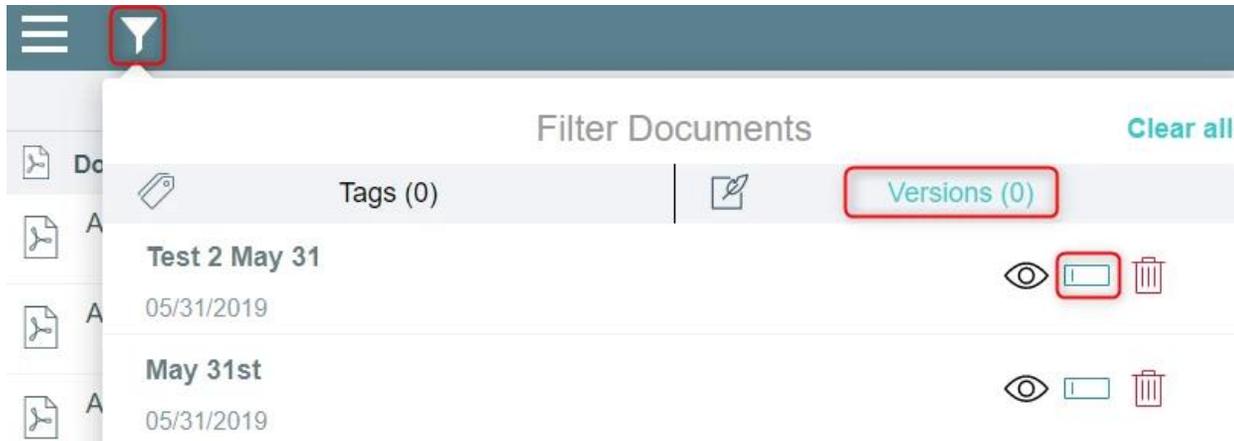
How to rotate a document

1. From your desired project, click on the document you wish to rotate and use the arrows

A101 (Rev. 1)
Site Plan

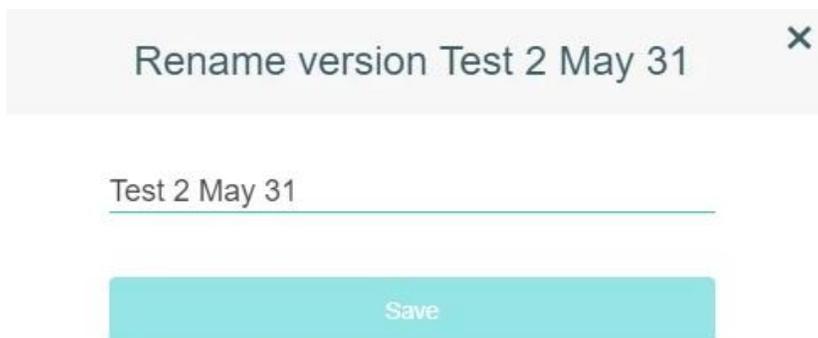A101 (Rev. 1)

How to change the version name

1. Within the desired project, click on the filter and select Versions

2. Click on the icon between the eye and garbage can

3. Rename your version and click **Save**

How to delete a version of documents

1. Click on the project that you want to delete a version on

2. Click on the filter icon

3. Click on the garbage can beside the version that you wish to delete

4. Write DELETE to confirm
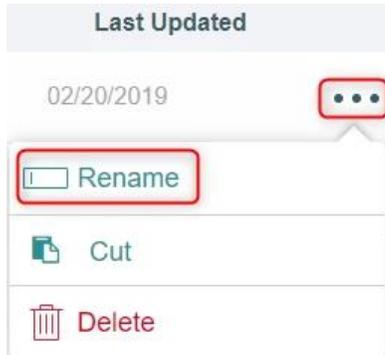

5. Click on the delete button

How to modify a document name

1. Select the project and then document you wish to rename

2. At the far right, click the 3 dots and select Rename

Last Updated

02/20/2019 •••

☐ Rename

📋 Cut

🗑 Delete

3. Rename your document as necessary and click Save

Rename your document ✕

A000

DOCUMENT NAME

Save

How to modify the document title

1. Access the document you wish to modify

2. Click on the Revision #

📄 A101 (Rev. 0)
Site Plan

3. Click on Edit

Revision **0**
Initial Set
02/20/2019 1:36 pm

Edit   Delete

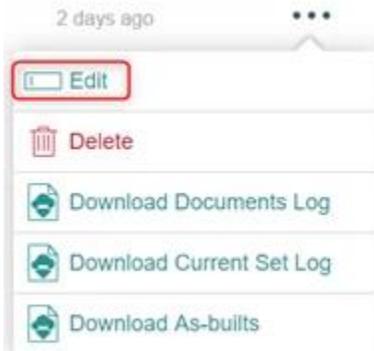4. A screen will then open allowing you to modify the document title

5. Click save once done

How to choose custom document ordering patterns

1. Click on 3 dots beside your project and then on Edit.

2. You then have an option to enter document ordering patterns. (Example: Documents that start with E come before documents that start with A). **Note that this option is only available for owner's unless they have given access to Administrators to modify on their behalf.**
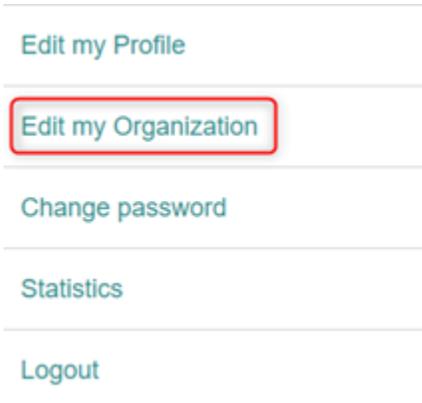
How to allow admins to create, rename and delete projects

1. From the web portal click on the 3 dots menu
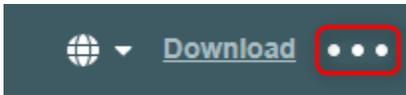
2. Click on Edit my organization

3. Check the box beside Allow my admins to create, rename and delete projects on my behalf and click on **Confirm**