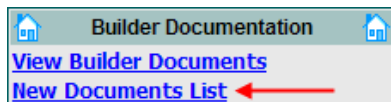


# View & Upload Job Documents

Document Management allows users to view and upload documents for all of their assigned accounts. The Document Viewer role can only view documents. The Document Admin role can view, edit, update, and delete documents as well upload new documents and hyperlinks. These functions only apply to documents uploaded by the supplier. If you cannot upload documents, view a folder, or view a document, contact the builder for access.

## Viewing the New Documents List

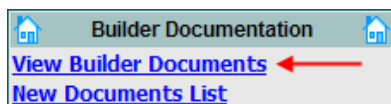
1. Log into SupplyPro. The Home page opens.
2. Click on the **New Documents List** link in the **Builder Documentation** box.





3. Choose from the **Builder** and **Days** drop-down filters. Click the **Display Documents** button.
4. Click on the **Doc/Link Name** link to view the document or link.

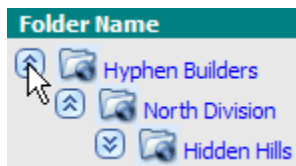
## Accessing Document Management

1. On the Home page, click on the **View Builder Documents** link in the **Builder Documentation** box.

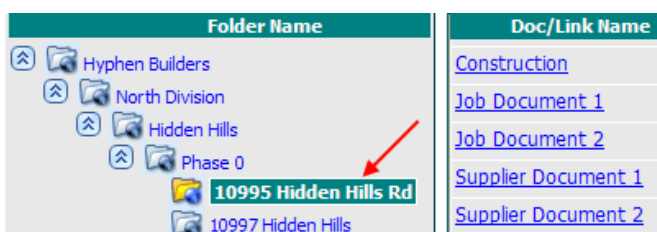


2. Click on the  down arrow next to a **Builder Folder** to view its subfolders. The down arrow changes to an  up arrow.


*Note: The folder structure follows the builder's org structure: Company, Division, Subdivision, Phase, Job.*




3. Click on the **Folder Name** to view the folder's documents. The list of documents appears on the right side of the page.




## Viewing Documents

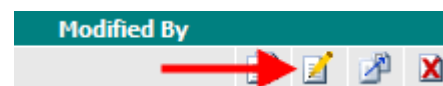
1. Open the **View Builder Documents** page. Open the appropriate folder.
2. Click on the **Doc/Link Name** link to view the document. A dialog box opens.
3. Click the **Open** button to view the document. Or, click the **Save** button to save the document onto your computer.
4. To view the history of the document, click on the  **History** icon on the right side of the document row. The Document History pop-up window opens.

Doc/Link Name	Type	Size	Rev	Last Update	Modified By
<a href="#">Construction</a>		1.96 KB	1	5/5/2008	
<a href="#">Job Document 1</a>		44.00 KB	1	6/30/2008	

5. To view the original document that was first uploaded, click on the **Uploaded** link under the **Action** column.

## Editing a Document's Properties


1. On the View/Manage Documents page, click on the  **Edit** icon on the right side of the document row. (Document Admins only)



2. Edit the **Document Properties** as necessary. Click the **Update & Close** button.

*Note: You cannot edit documents uploaded by a builder.*

## Updating an Existing Document

1. On the View Builder Documents page, click on the  **Update** icon on the right side of the document row. The Update Document pop-up window opens. (Document Admins only)



# View & Upload Job Documents

Cont'd

- Click on the **Browse...** button. The Open File dialog box opens.
- Locate the updated version of the document on your computer. Click on the file to select it, and click the **Open** button. The file appears in the Browse... box.
- Click the **Upload Files & Close Window** button. The document appears in the document list in place of the previous version of the document.

*Note: You cannot update documents uploaded by a builder.*

## Deleting a Document

- On the View Builder Documents page, click on the  **Delete** icon on the right side of the document row. (Document Admins only)

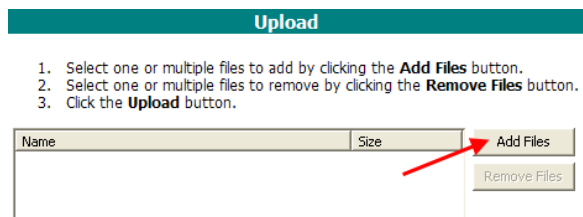


- Click **OK** on the confirmation message to delete the document. Or, click **Cancel** to close the message without deleting the document.

*Note: You cannot delete documents uploaded by a builder.*

## Uploading a New Document

- On the View Builder Documents page, click on the **Upload Documents** button at the bottom of the page. (Document Admins only)
- If this is your first upload, click on the bar at the top of the pop-up and choose **Install ActiveX Control**. Click the **Install** button on the Security Warning.
- On the Upload pop-up window, click the **Add Files** button. The Add File dialog box opens.



- Locate the document(s) you want to upload. Hold down the **Ctrl** key, and click on each document. (Max of 10 files, max file size 2 MB each)

- Click the **Add** button. The file(s) you selected appear in the Upload pop-up window.
- Click the **Upload** button.
- When the **Transfer Finalized** message appears, click **OK**. The Upload Documents pop-up window opens.

File Name	Document Name	Document Notes	Rev	Size	Type	All Supplier View
Document 1.doc	Document 1		1	25.50 KB		<input type="checkbox"/>

- For each document, enter a **Document Name** and **Document Notes**.
  - To allow all suppliers, even those outside your company, to view this document, click the **All Supplier View** check box. Leave it unchecked to allow only the builder and other users in your company to view the document.
- Note: You can change this setting when you edit the document properties.*
- After you have entered information for all documents, click the **Update & Close** button on the Upload Documents pop-up window. The new documents appear in the document list.

## Uploading a Hyperlink

- On the View Builder Documents page, click on the **Add Hyperlinks** button. The Add Hyperlink pop-up window opens. (Document Admins only)

Link Name	Link Notes	Link URL
Hyphen University	Go to this website to watch SupplyPro videos and read the latest release notes.	http://www.hyphensolutions.com/info/sup

- Enter the **Link Name**, **Link Notes**, and **Link URL**, including the **http://** or **https://**.
- Click the **Test Link** button next to each link to test that the link opens the correct web page. The web page opens in a new window.
- Click the **Update & Close** button. The link appears in the document list.