



e-BUILDER TIP OF THE MONTH

October 2018

TIP: ATTACHING DOCUMENTS

e-Builder Product Enhancement to Attached Documents within Submittals

This Enhancement works with Fire Fox and Chrome it will not work with Internet Explorer

TIP: ATTACHING DOCUMENTS





Attaching an Item into the Submittal Register can either be done by clicking on the Paper Clip under the Item Details or you can click on the Item Title or the Item Number which opens the Submittal Item Details page.

Submittal Register for *PSG Caveman Project

Filter Submittal Items

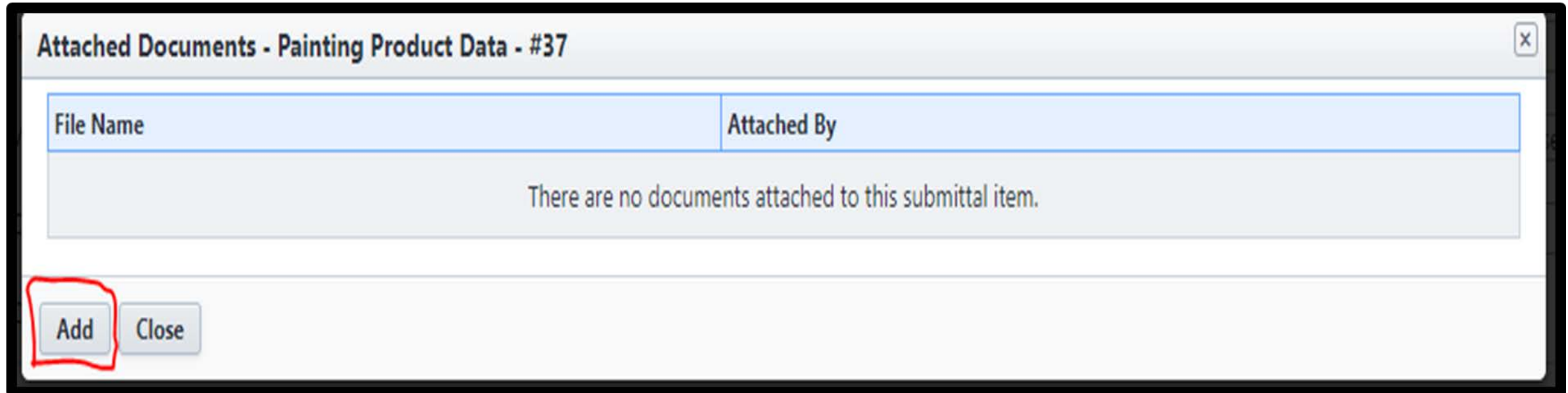
Group By: None | Page: 1 of 1 | Show: 100 per page

Update Status | Forward for Review | Send to Sub

| Item Details | Title | # | Rev # | Package # | Spec Section | Sub Section | Category | Status | Submittal Coordinator | Held By |
|---|--|----|-------|--------------|-------------------------------|-------------|--------------|------------|-----------------------|-------------|
|  | Door Hardware Product Data | 26 | 1 | 1-08 00 00-2 | 08 71 00 - DOOR HARDWARE | 1.08,A | Product Data | Not Review | Kelly Davis | Kelly Davis |
|  | Resilient Flooring Samples - Tile & Base | 36 | 0 | 2-09 00 00-0 | 09 65 00 - RESILIENT FLOORING | 1.04,A | Sample | NEW | Kelly Davis | Kelly Davis |
|  | Painting Product Data | 37 | 0 | 2-09 00 00-0 | 09 91 00 - PAINTING | 1.04,A | Product Data | NEW | Kelly Davis | Kelly Davis |
|  | Painting Samples | 38 | 0 | 2-09 00 00-0 | 09 91 00 - PAINTING | 1.04,B | Sample | NEW | Kelly Davis | Kelly Davis |

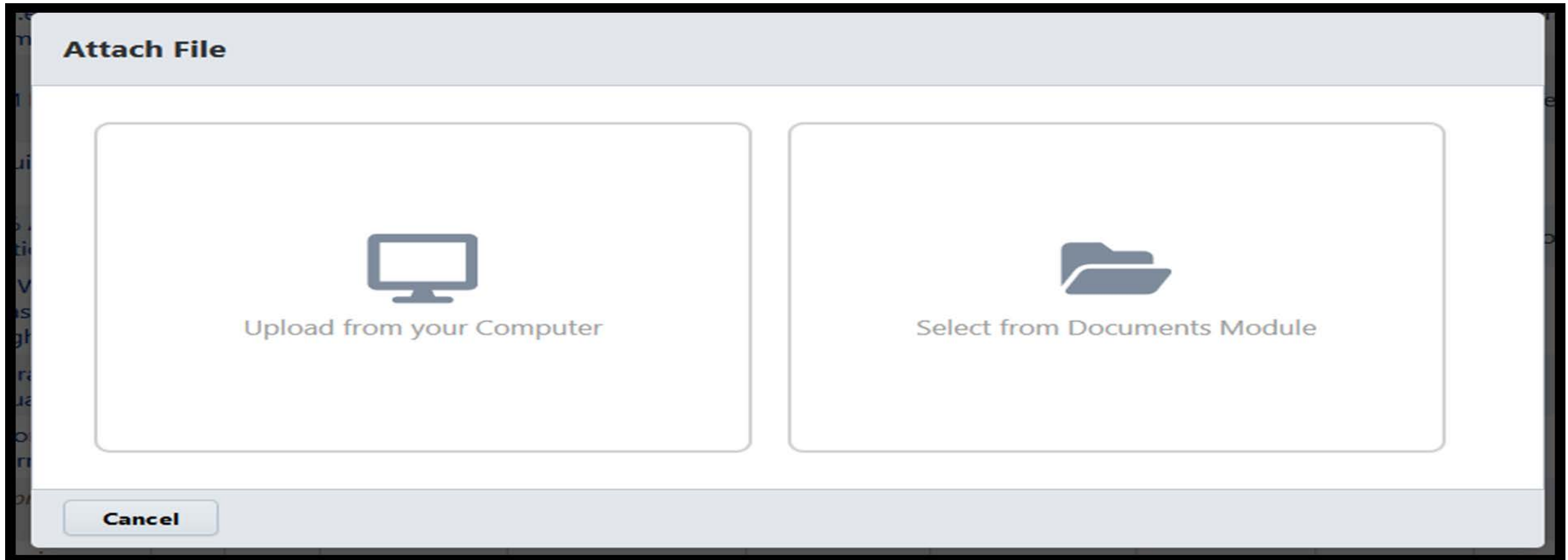
TIP: ATTACHING DOCUMENTS

If you choose to upload to the Submittal Register by attaching to the Paper Clip, the Attach Documents window will open click on the Add button.



TIP: ATTACHING DOCUMENTS

The Attach File window pops up for you to select either Upload from your Computer or Select from Documents Module. If you click on the Upload from your Computer the Attach File Destination Folder Opens.



TIP: ATTACHING DOCUMENTS

If you clicked on the Item Title or the Item Number from the Submittal Register the Submittal Item Details page opens giving you the option to drag and drop files to upload or browse. With this selection you will not see the window to Upload from your Computer or Select from Documents Module.

The screenshot displays the 'Submittal Item Details' page. At the top, a blue banner contains a note: 'The item is pending review or has been approved by the coordinator or has been closed. It cannot be edited at this time.' Below this, there are tabs for 'Submittal Item Overview', 'Date Details', and 'History'. The main content area is divided into two columns of metadata. The left column includes fields for Project, Title, Number, Description, Package #, Spec Section, Category, Responsible Sub/Manufacturer, Submittal Coordinator, and Item Held By. The right column includes Project Number, Status, Item Status, Priority, Revision, Sub Section, and Commitment. At the bottom, there are tabs for 'Documents (0)', 'Comments (0)', 'Custom Fields (0)', and 'Revisions (0)'. Below these tabs is a table header with columns for 'File Name', 'Attached By', and 'Date Attached'. A large dashed box below the header contains the text 'Drag and drop files here to upload, or browse.' and an 'Attach' button.

Submittal Item Details

Note
The item is pending review or has been approved by the coordinator or has been closed. It cannot be edited at this time.

Submittal Item Overview | Date Details | History

Forward for Review | Update Status

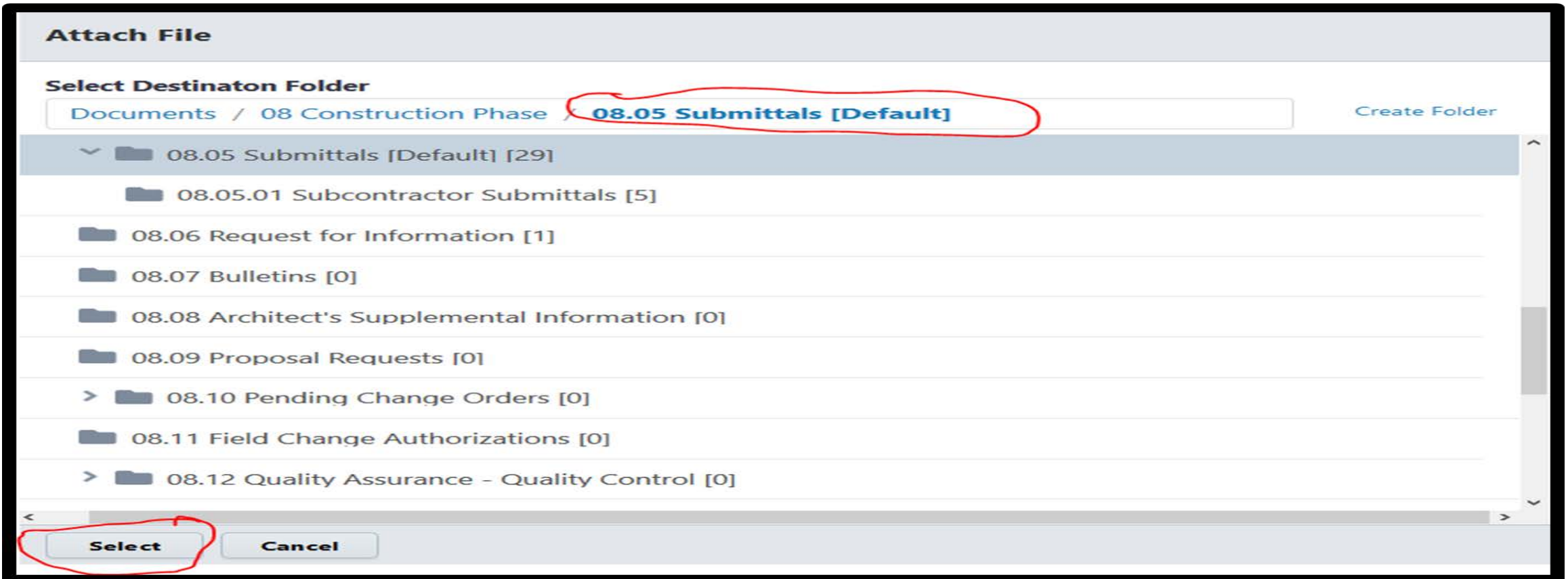
| | | | |
|------------------------------|-----------------------|----------------|--------|
| Project | *PSG Caveman Project | Project Number | 10013 |
| Title | Painting Product Data | Status | NEW |
| Number | 37 | Item Status | Open |
| Description | | Priority | Normal |
| Package # | 2-09 00 00-0 | Revision | 0 |
| Spec Section | 09 91 00 - PAINTING | Sub Section | 1.04.A |
| Category | Product Data | Commitment | |
| Responsible Sub/Manufacturer | | | |
| Submittal Coordinator | Kelly Davis | | |
| Item Held By | Kelly Davis | | |

Documents (0) | Comments (0) | Custom Fields (0) | Revisions (0)

| File Name | Attached By | Date Attached | Attach |
|--|-------------|---------------|--------|
| Drag and drop files here to upload, or browse. | | | Attach |

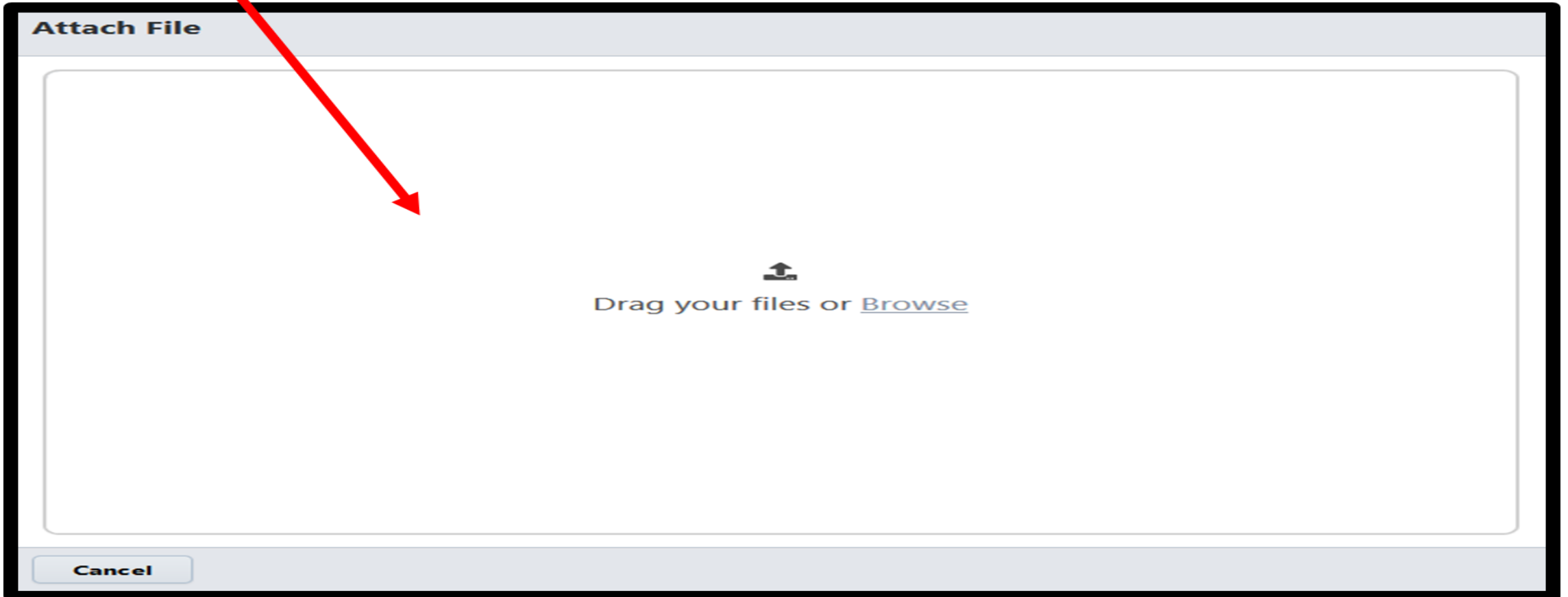
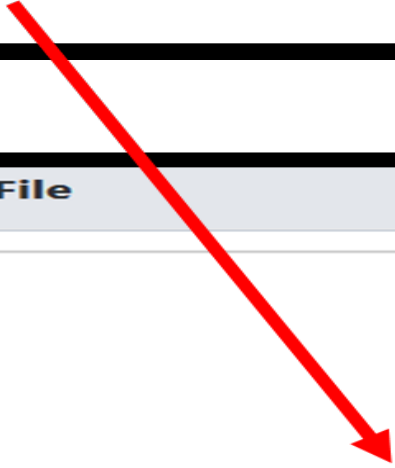
TIP: ATTACHING DOCUMENTS

The Attach File window will open with 08.05 Submittals Default folder automatically selected, click on Select at the bottom.



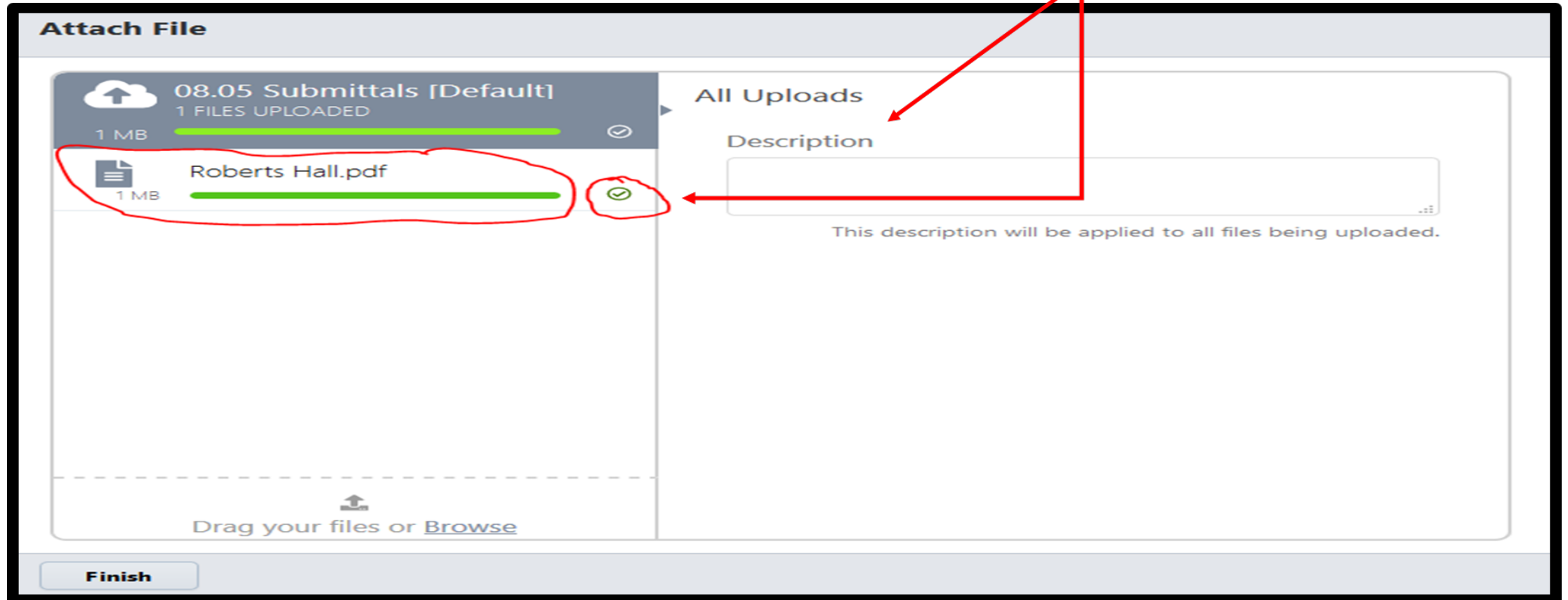
TIP: ATTACHING DOCUMENTS

Drag the file here that you want to attach or click on Browse.



TIP: ATTACHING DOCUMENTS

The following Attach File window opens showing the file name that you selected to uploaded to the 08.05 Submittal Default folder. If you selected the wrong file hover over the green check mark in the green circle and it will turn into a trash can for you to delete your file. You can now add a Description to the file prior to clicking on the Finish button.



TIP: ATTACHING DOCUMENTS









The Submittal Register will now show you have an item attached.

Submittal Register for *PSG Caveman Project

Filter Submittal Items

Group By: None Page 1 of 1 Show 100 per page

Update Status Forward for Review Send to Sub Add to Package Add Item Delete Import

| Item Details | Title | # | Rev # | Package # | Spec Section | Sub Section | Category | Status | Submittal Coordinator | Held By | Reviewers |
|---|--|----|-------|--------------|-------------------------------|-------------|--------------|-------------|-----------------------|-------------|-----------|
|   | Door Hardware Product Data | 26 | 1 | 1-08 00 00-2 | 08 71 00 - DOOR HARDWARE | 1.08,A | Product Data | Not Reviewe | Kelly Davis | Kelly Davis | Reviewers |
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| | | | | | 11 53 13 - | | | | | | |

The background features abstract, flowing waves in shades of red, orange, and yellow, creating a dynamic and modern aesthetic. The waves are layered and semi-transparent, giving a sense of movement and depth.

e-BUILDER QUESTIONS?

October 2018