

FILE MANAGEMENT

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.

To navigate this Quick Reference Guide, simply scroll down, or use the following hyperlinks to jump to a specific section.

[Open Files Shared with Me](#)

[Upload a Folder Structure](#)

[Uploading Files](#)

[File Information and Actions](#)

[Access Form Attachments](#)

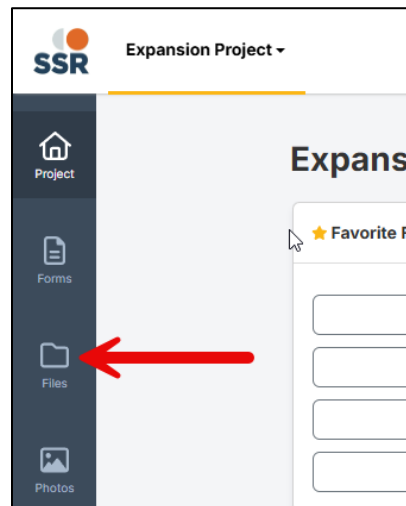
[Manage Halted/Obsolete Files](#)

[Unobsolete a Project File](#)

[Related Resources](#)

OPEN FILES SHARED WITH ME

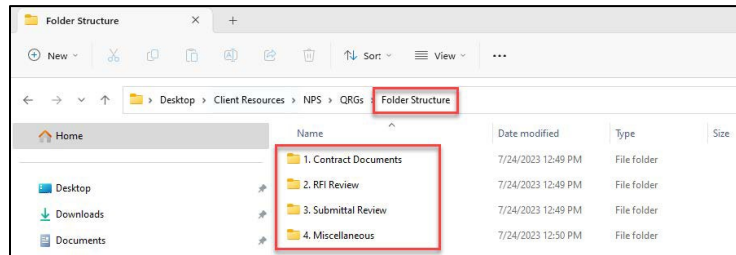
- a. With the project open, you'll see the left sidebar in any page shows icons for the major areas of functionality of ProjectTeam. Click on **Files**.



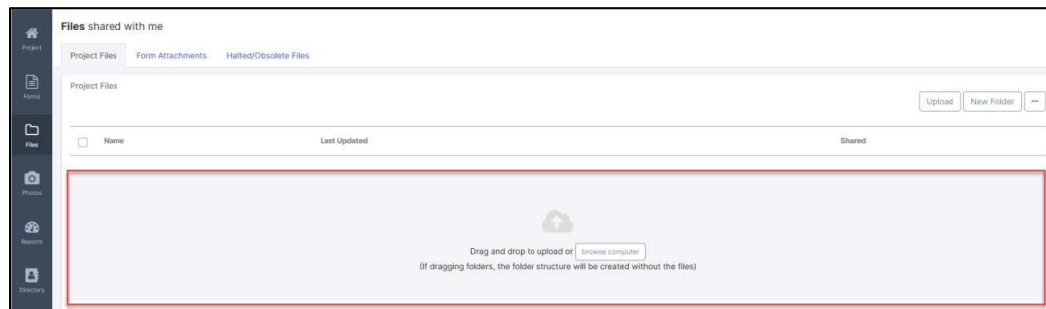
- 2) The Files shared with me pane opens to the **Project Files** tab.
 - a. Click on any Folder to drill down or click on the File name to open the preview screen.

UPLOAD A FOLDER STRUCTURE

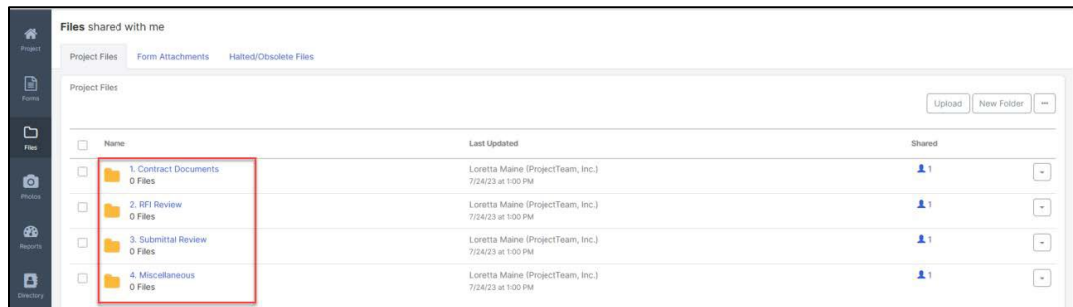
- 1) Open the desired folder structure from **File Explorer** on your computer.



- 2) Open the desired folders and then drag and drop the structure into the bottom panel of the **Project Files** tab.

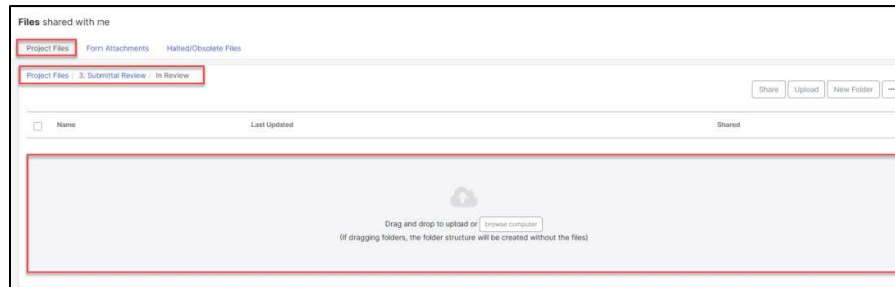


- 3) The entire folder structure uploads. No files contained in the folder structure will be uploaded, only parent folders and any folders within them.



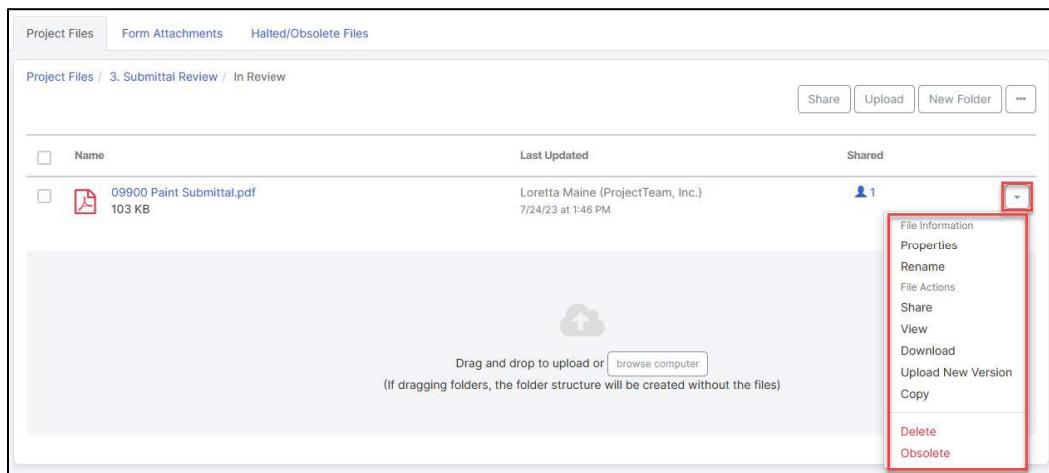
UPLOADING FILES

- 1) Open the desired folder, browse to the file location from your computer's **File Explorer**, then drag and drop the one or more files into the bottom pane.



FILE INFORMATION AND ACTIONS

- 1) Click the dropdown menu to the right of the file name and select the appropriate action.

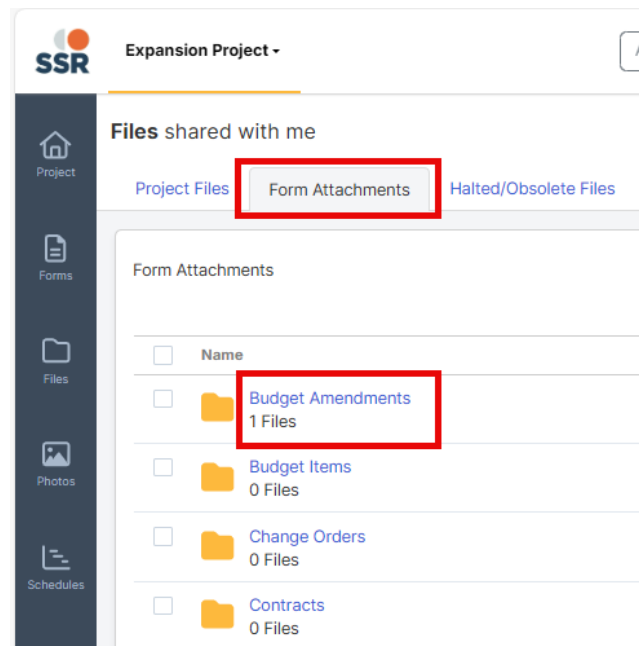


- **Properties:** Opens the form record associated with the file.
- **Rename:** Users can rename files.
- **Share:** Select Share Groups and/or users to share the file with.
- **View:** Opens a preview of the file.
- **Download:** Saves a copy of the file to the Downloads file on your computer's File Explorer.
- **Upload New Version:** Upload revised versions of the same file.
- **Copy:** Allows you to Copy the file to another folder within your Project Files.
- **Delete:** Files that have not been shared with other users can also be Deleted using the dropdown menu.
- **Obsolete:** Files can be Obsoleted to remove it from Project Files. Anyone that previously had access to it will be able to access it from the Halted/Obsolete Files tab.

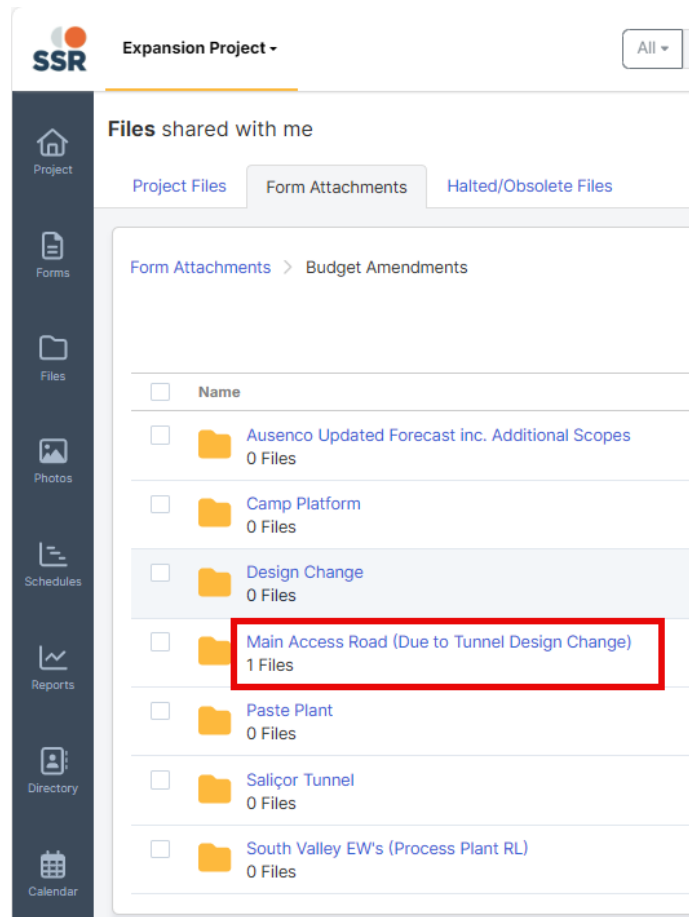
ACCESS FORM ATTACHMENTS

By default a folder is created for all form types under the **Form Attachments** tab. As forms are added to the Form Type, a sub-folder is created for each record. When files are attached to any form the file is stored in the folder created for that form type using the Document Subject as a title for the sub-folder.

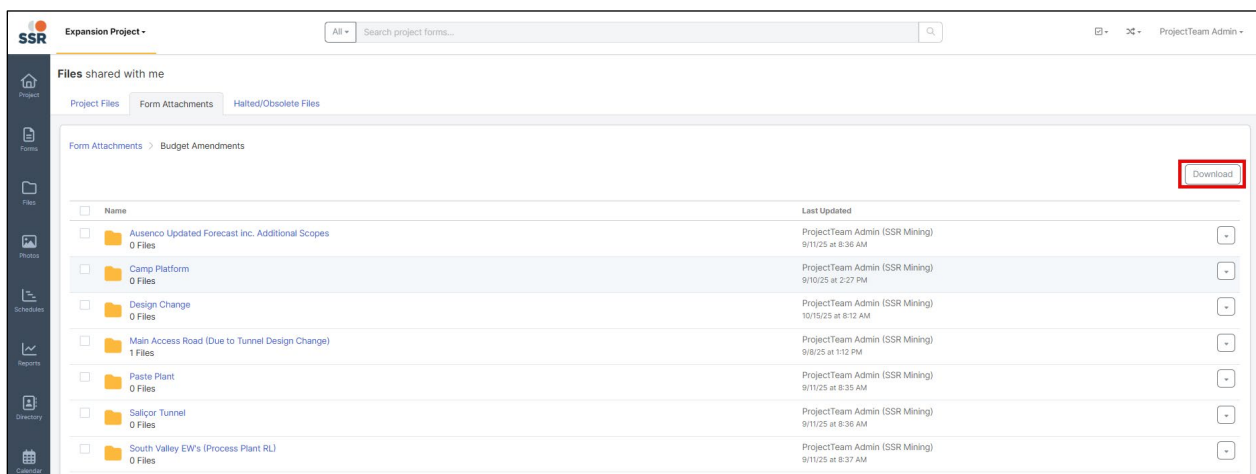
- 1) Open the **Form Attachments** tab.
- 2) Open the folder for the applicable **Form Type**.
 - a. You can see which folders contain files under the Form Type name.



- 3) Open the folder for the applicable **Form** to access the file.



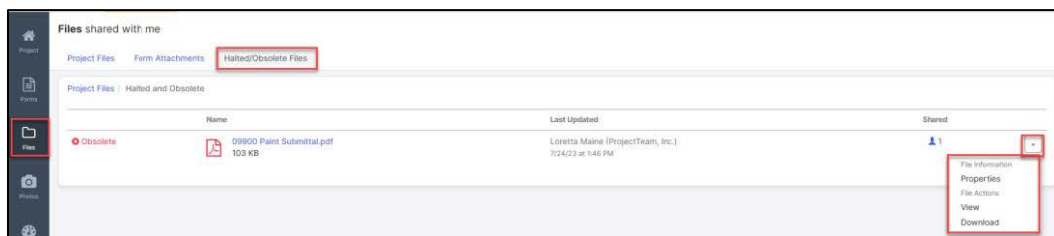
- 4) You can **Download** the Form Type folder with all sub-folders and files.



MANAGE HALTED/OBSOLETE FILES

A *Project File* that has been made Obsolete will no longer appear in the *Project Files* tab but can still be accessed from the Halted/Obsolete Files tab. **NOTE:** Files contained on the Form Attachments that have been obsoleted will not be shown on the Halted/Obsolete Files tab.

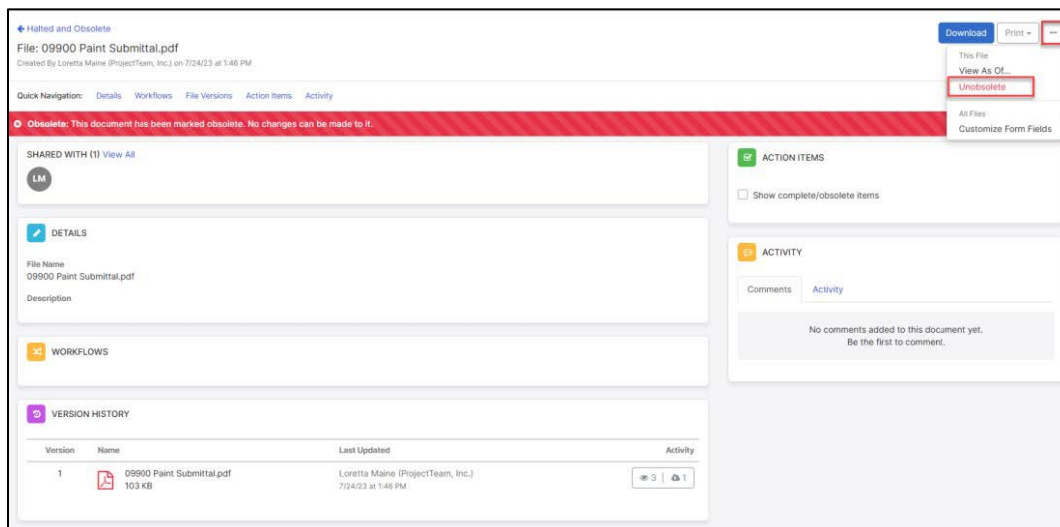
- 1) Open the **Halted/Obsolete Files** tab.
- 2) Click the drop down arrow to **View** or **Download** the file.



UNOBSOLETE A PROJECT FILE

When a Project File document has been marked as obsolete, it can be moved back to Project Files and opened back up for changes by making it Unobsolete.

- 1) From the drop down menu, select **Properties**.
- 2) Click the ellipse button ... on the top right of the pane and select **Unobsolete**.



RELATED RESOURCES

Help Pages:

- [Files Overview](#)
- [Viewing files and attachments](#)
- [Video: Project Files Overview](#)

Related QRGs:

- Sharing Records
- Adding Attachments