



## Files User Guide



Managing portfolio and building specific files

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## Overview

The Files module is a central repository for both portfolio and building specific documents. Files are housed in folders and subfolders that are dependent upon their content and/or purpose.

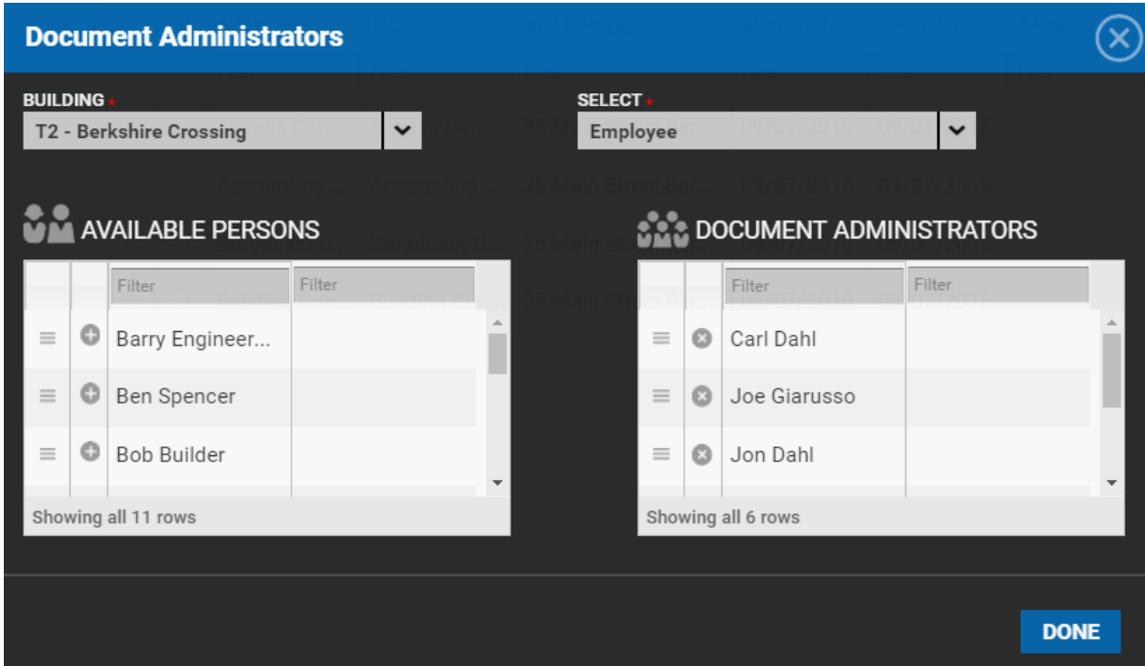
Any user designated as either a Property Manager or Coordinator has access to the file's administrative functionality. Administrative functionality allows a user to modify or delete folders, subfolders, or files that were NOT previously locked by another user.

### Granting File Admin Access

Users with access to the File Admin functionality (Property Manager and Coordinator role) can grant other employees access via the **Manage Groups** button.

To grant another user access:

1. Click **Go To → Files → Files**.
2. Click **Manage Groups → Document Administrators**.
3. Using the pop up box, click either the  that corresponds to the user's name or drag and drop the name from the **AVAILABLE PERSONS** box to the **DOCUMENT ADMINISTRATORS** box.



**Document Administrators**

BUILDING: T2 - Berkshire Crossing

SELECT: Employee

**AVAILABLE PERSONS**

	Filter	Filter
+	Barry Engineer...	
+	Ben Spencer	
+	Bob Builder	

Showing all 11 rows

**DOCUMENT ADMINISTRATORS**

	Filter	Filter
-	Carl Dahl	
-	Joe Giarusso	
-	Jon Dahl	

Showing all 6 rows

**DONE**

4. Click **DONE** to save.

## Managing File Folders

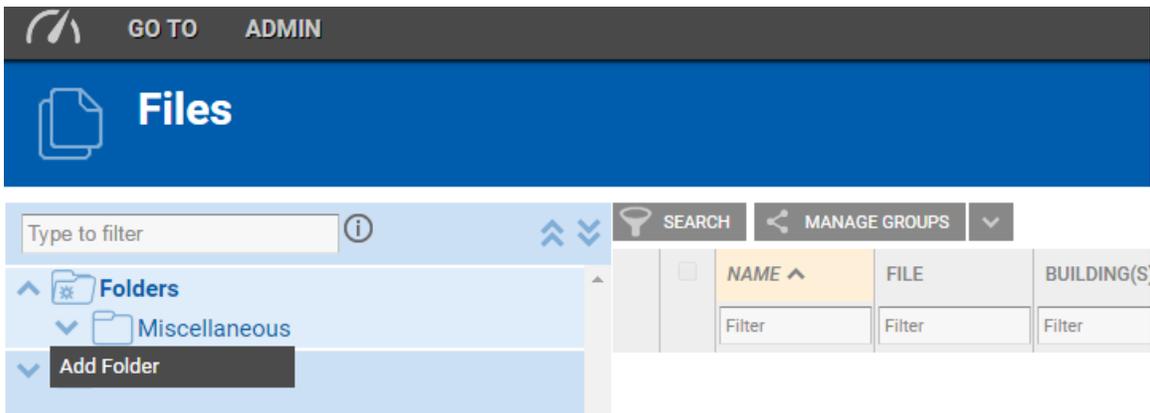
Folders and subfolders are used to create organization for the files stored within Building Engines. **The folder hierarchy is viewed the same by all users and across all buildings.** Only users with admin access are able to create, edit and delete their accounts folders and subfolders. This section describes how to create, edit, and delete folders from the desktop version of Building Engines.

### Creating a Folder

This section describes how to create a new folder.

To create a folder:

1. Click **Go To → Files → Files**.
2. Navigate to the folders window, right click, and click **Add Folder**.



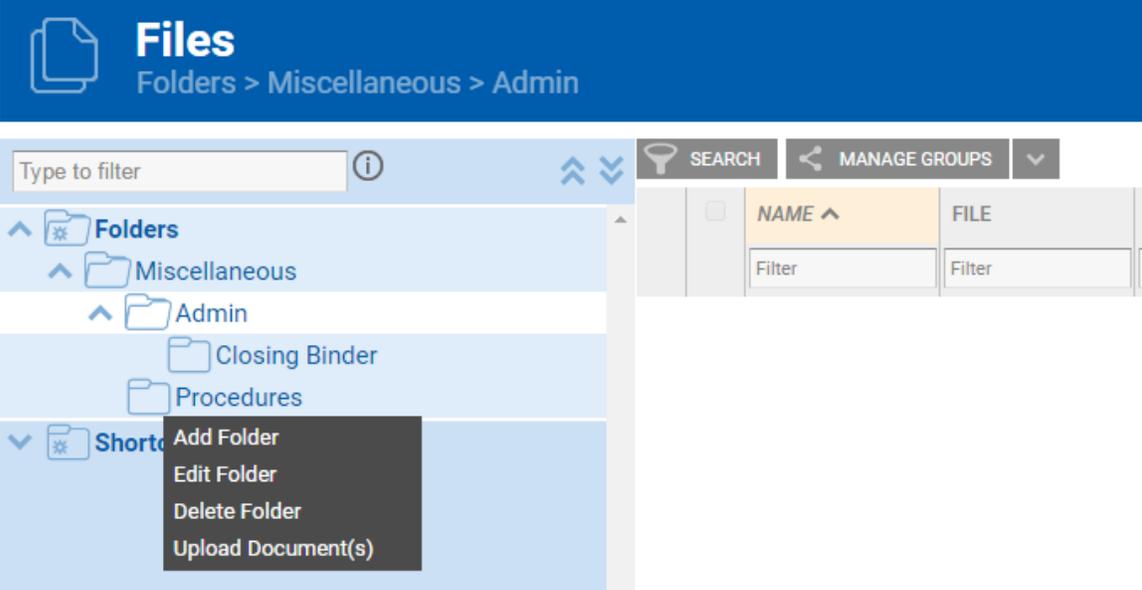
3. Enter a **FOLDER NAME**, **FOLDER DESCRIPTION**, and **PARENT FOLDER**.
4. Select the systems users who can view and edit the documents contained in the folder.
5. Click **SAVE**.

### Editing a Folder

This section describes how to edit an existing folder.

To edit a folder:

1. Click **Go To → Files → Files**.
2. Navigate to the folders window, right click the folder you want to edit, and select **Edit Folder**.



3. Edit the folder or subfolder.
4. Click **SAVE**.

### Deleting a Folder

This section describes how to delete an existing folder.

To delete a folder:

1. Click **Go To → Files → Files**.
2. Navigate to the folders window, right click the folder you want to delete, and select **Delete Folder**.
3. Click **DELETE** to confirm folder or subfolder deletion.

## Managing Files

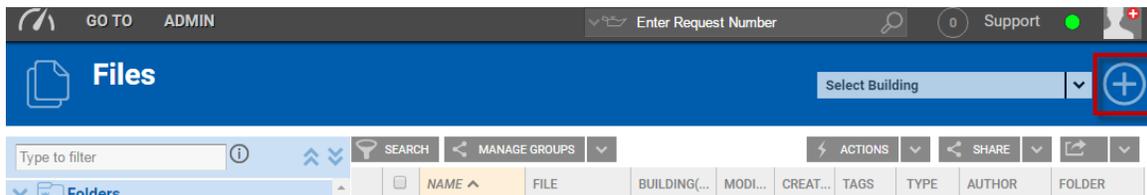
This section describes how to upload, delete, update, and search for the files stored in your folders.

### Uploading a File

This section describes the process of uploading a file.

To upload a file:

1. Click **Go To → Files → Files**.
2. Click .



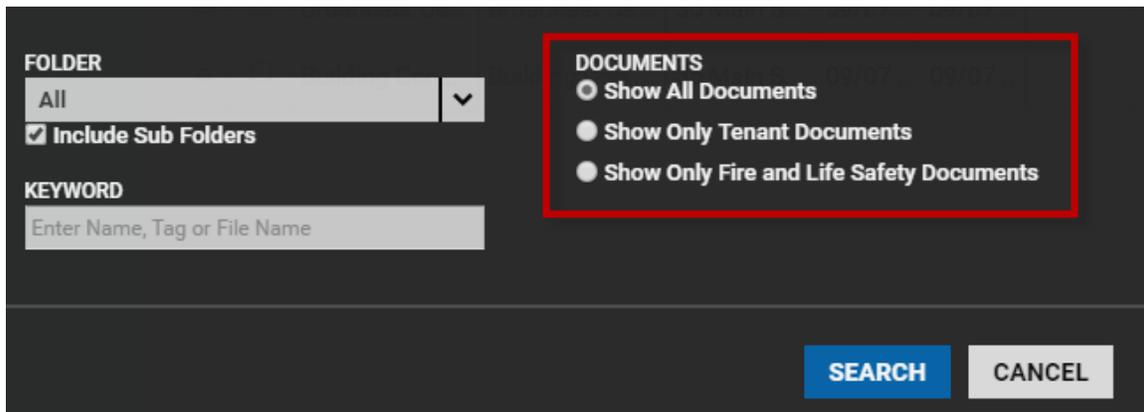
3. Using the **File(s)** pop up, enter the following file information:
  - a. **FOLDER:** Confirm the folder where the file is stored.
  - b. **LANGUAGE:** If your account is configured in multiple languages, confirm the language the file is in.
  - c. **TAGS:** Enter search tags, separated by a comma, into this field. Users will be able to search for this file at a later time using these keywords.
  - d. **ADD FILES:** To attach the file either click **ADD FILES** or drag and drop the file into the **Drag Files Here** area.
  - e. **BUILDINGS:** Select the buildings that the file can be accessed from.
  - f. **TENANT DISPLAY:** This setting allows you to distinguish which system users can access the file. You also have the ability to choose how they can access the file.
4. Click **SAVE**.

## Deleting a File

This section describes the process of deleting a file.

To delete a file:

1. Click **Go To → Files → Files**.
2. Click .
3. (Optional) Using the **FOLDER** field, select the folder or subfolder where the file is stored.
4. (Optional) Using the **KEYWORD** field, enter keywords, names, or tags that are associated to the file.
5. (Optional) Select the document type that best describes the document or file you are searching for.



6. Following your search, the file grid populates your results. Click the box that corresponds to the file you want to delete.
7. Click **ACTIONS**, and select **Delete Document(s)**.

	NAME ^	FILE	BUILDING(S)	MODIFIED	CRE		TYPE	AUTHOR
	Filter	Filter	Filter	Filter	Filter			Filter
<input checked="" type="checkbox"/>	Access Card M...	Access Card M...	35 Main Street,B...	09/07/20...	09/07/20...			Carl Dahl
<input checked="" type="checkbox"/>	Accounting Us...	Accounting Us...	35 Main Street,B...	09/07/20...	09/07/20...			Carl Dahl
<input type="checkbox"/>	Broadcast Use...	Broadcast Use...	35 Main Street,B...	09/07/20...	09/07/20...			Carl Dahl
<input type="checkbox"/>	Building Conne...	Building Conne...	35 Main Street,B...	09/07/20...	09/07/20...			Carl Dahl

8. Click **DELETE** to confirm.
9. (Optional) Files can also be deleted by clicking **DELETE** from within the file record.

## Updating a File

This section describes the process of updating a file.

To update a file:

1. Click **Go To → Files → Files**.
2. Click the folder or subfolder where the file is stored.
3. Click the file **NAME**.
4. In Files section, click **Replace File**.
5. Select a new file from your computer or thumb drive.
6. Click **SAVE**.

## Moving a File

This section describes the process of moving a file from one folder or subfolder to another.

To move a file:

1. Click **Go To → Files → Files**.
2. Click the folder or subfolder where the file is stored.
3. Click the box that corresponds to the file you want to move.
4. Click **ACTIONS → Move Document(s)**.

	SEARCH	MANAGE GROUPS	ACTIONS	SHARE			
	NAME ^	FILE	BUILDING(S)	MODIFIED	CRE	PE	AUTHOR
	Filter	Filter	Filter	Filter	Filter		Filter
<input checked="" type="checkbox"/>	Access Card M...	Access Card M...	35 Main Street,B...	09/07/20...	09/07/20...		Carl Dahl
<input checked="" type="checkbox"/>	Accounting Us...	Accounting Us...	35 Main Street,B...	09/07/20...	09/07/20...		Carl Dahl
<input type="checkbox"/>	Broadcast Use...	Broadcast Use...	35 Main Street,B...	09/07/20...	09/07/20...		Carl Dahl
<input type="checkbox"/>	Building Conne...	Building Conne...	35 Main Street,B...	09/07/20...	09/07/20...		Carl Dahl

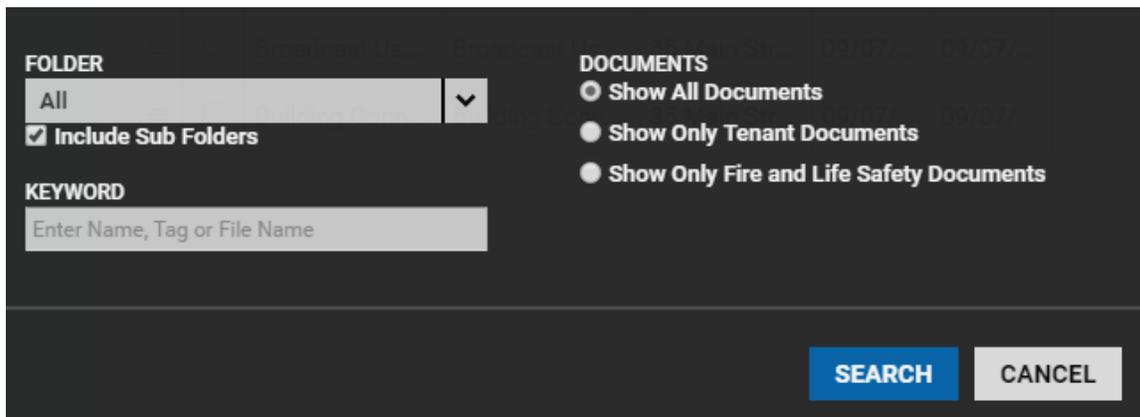
5. Using the **FOLDER** field, select the file's new folder or subfolder and click **MOVE**.

## Searching for a File

This section describes the process of searching for a file.

To search for a file:

1. Click **Go To → Files → Files**.
2. Click .
3. (Optional) Select the **FOLDER** you believe the folder may be housed in.
4. (Optional) Using the **KEYWORD** field, enter file related words or tags.
5. (Optional) Using the radio buttons, filter by document type.



The screenshot shows a search interface with the following elements:

- FOLDER**: A dropdown menu currently set to "All" with a checkmark icon to its right.
- Include Sub Folders**
- KEYWORD**: A text input field with the placeholder text "Enter Name, Tag or File Name".
- DOCUMENTS**: Three radio button options:
  - Show All Documents
  - Show Only Tenant Documents
  - Show Only Fire and Life Safety Documents
- At the bottom right, there are two buttons: a blue **SEARCH** button and a grey **CANCEL** button.

6. Click **SEARCH**.

## Shortcuts

Shortcuts were designed to give you quick access to files housed in other areas of the application. You can access tenant leases, vendor contracts, and COIs by clicking into the relevant folder or subfolder. *Note: Folders and subfolders in the shortcuts area cannot be modified or deleted.*

### Navigating to the Shortcuts

To locate the file shortcuts:

1. Click **Go To → Files → Files**.
2. Click the **Shortcuts** folder.
3. Locate and click the desired file. Files appear on the right side grid.