XL UPLOAD USER GUIDE

DOCUMENT MANAGEMENT

INEIGHT

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CHAPTER 1 – GETTING STARTED

1.1 INTRODUCING XL-UPLOAD

XL-Upload is unique application used to upload drawings and controlled documents to the web-based project collaboration system.

XL-Upload enables parties to upload one or more documents of any format to using a Microsoft Excel workbook. XL-Upload requires only Microsoft Excel, an Internet connection and an Email application (e.g. Outlook, Outlook Express, Lotus Notes, Novell GroupWise, etc.).

In summary, the process that takes place is:

1. Documents are selected from within XL-Upload.

2. User populates document details in the spread sheet.

3. User validates document details via XL-Upload directly from the server.

4. XL-Upload automatically zips together the physical document and the attributes of the document (such as the Drawing Number, Title, Revision etc.) entered in the spread sheet and sends them via email to .

5. The documents go through a final validation at the server, and will then appear in the Document Register.

> **NOTE** Before you can use XL-Upload you will need to have been set up as a user of the system. If you have not been allocated a User ID for you should contact your or Company administrator.

1.2 DOWNLOADING AND INSTALLING XL-UPLOAD

The XL-Upload program can be downloaded from the following link:

https://www1.teambinder.com/downloads/

1. Click the **XL-Upload** link to start the download.

2. When prompted to Run or Save the file, select **Run**.

3. When the Install Shield wizard appears, follow the on screen instructions.

4. Once the installation is complete you will find a shortcut to XL-Upload.xls located on your Desktop.

CHAPTER 2 – SETTING UP XL-UPLOAD

2.1 DEFAULT SETTINGS

1. To load XL-Upload, click on the XL-Upload icon on your desktop. You will now see an empty work sheet with a new Menu item titled XL-Upload.

    > **NOTE**
    >
    > a. If you are using MS Excel 2007 or above, you will need to click the **Add-ins** menu first, and then select XL-Upload.
    >
    > b. If you are using an older version of MS Excel you will need to set your Microsoft Excel's Macro Security to Medium (Tools \ Macros \ Security).

2. Click on the **XL-Upload** menu item to load the XL-Upload menu ribbon. When you load XL-Upload for the first time you will need to complete some configuration information (default settings) prior to using the program. This establishes your User information, and identifies the project you are working on.
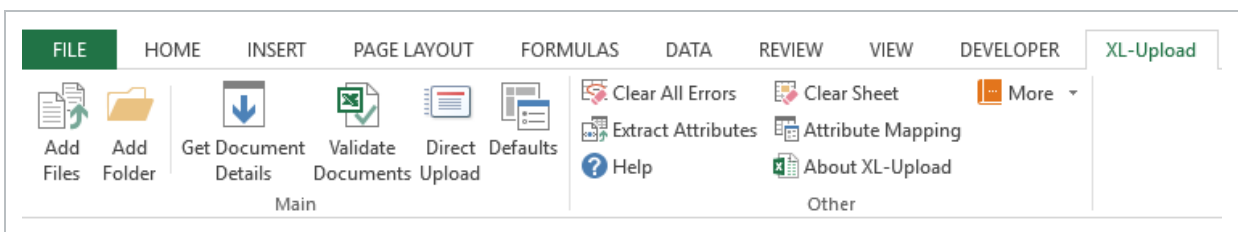
3. Click on the **Defaults** menu button.You will be prompted to enter the following:

    - **User ID**: User ID that you use to log into .

    - **Company ID**: Company ID that you use to log into .

    - **Server**: Using the drop-down box, select the web address that you use to log into (e.g. www.teambinder.com).

    - **Project Number**: Enter the Project Number of the project that you wish to upload the documents into.

- **Email Files to**: Using the drop-down box, select the email address that you wish to upload the documents to. By default there is usually only one email address (e.g. tb@tbupload.com).

- **Email Application**: Select the email application that you wish to use with XL-Upload.

- **File Name Format (Optional)**: Allows you to automatically extract available document attributes from the filename of the document. In order to use this feature the filename mapping needs to be set up in the XL-Upload Defaults. See section 2.2 Setting up File Name Formats for more information.

- **File Formats and Methods of Extracting Attributes:** XL-Upload enables you to extract attributes from Microsoft Office (Word, Excel and PowerPoint & PDF files in addition to AutoCAD DWG files.

4. Click **OK** when done.

2.2 SETTING UP FILE NAME FORMATS

XL-Upload can automatically extract available document attributes from the File Name of the document. In order to use this feature, the filename mapping needs to be set up in the XL-Upload Defaults.

1. Click on the **Defaults** button in the XL-Upload menu.

2. Select the **File Name Format** fields that match your document naming convention. XL-Upload will automatically populate the spread sheet with the identified values.

3. Choose the (Ignore) option from the drop-down boxes for any part of your File Name that you do not want to appear in your XL-Upload spread sheet. You would use this option if your file name syntax had less than three fields, or if the file name contained irrelevant information.

4. Type your File Name 'Separator' in the small boxes between the drop-down boxes.

For example, your standard file-naming convention may include the Document Number, Revision, Discipline and a Title. An example of this would be 'A001-3-ELEC-Level 2 Electric Schematic' where 'A001' is the document number, '3' is the document revision, 'ELEC' is the Discipline and 'Level 2 Electrical Schematic' is the Title.

In the File Format boxes you would select/enter: DocumentNo – Rev – Discipline – Title

> **NOTE**
>
> 1. To change the **Default** Settings at any time select Defaults from the XL-Upload menu.
>
> 2. Filenames can contain any of the following elements: Document Number, Revision, Status, Title, Location, Discipline, Category, Type, RevNotes and Remarks.
>
> 3. All elements must match the values in the Configuration Tables.

2.3 USING CUSTOM FIELDS

XL-Upload will automatically recognise and add any customised fields which exist within your project on . This allows XL-Upload to be utilised across multiple projects with different customisations without the need for customised installation files.

If the document module has custom fields that are linked to a configuration tables, they will be also shown as dropdown fields in XL-Upload without the need to have a customised version of XL-Upload.

This feature is accessed by selecting **Defaults** from the XL-Upload menu, where you will be required to specify your project settings. When you exit **Defaults** you will be prompted to enter your user security credentials.

Once you have successfully entered your credentials, XL-Upload will review your project for any custom Document fields and automatically insert them into your XL-Upload sheet.

This can also be done manually at any time by clicking the **Get Document Details** button on the XL-Upload menu ribbon.

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CHAPTER 3 – USING XL-UPLOAD

3.1 UPLOADING NEW DOCUMENTS

1. Load XL-Upload by clicking on the XL-Upload icon on your desktop.

2. Click the XL-Upload menu and select **Add Files** from the menu.

3. Navigate to the location on your computer where the files that you wish to upload are situated.

4. Select the file(s) that you wish to upload and click **Open**.

5. Click **Extract Attributes** if you are using attribute extraction to extract the document details directly from Microsoft Word, Excel or Power Point files, PDF, or AutoCAD DWG files.

6. Check the Document No. field is populated correctly either via the File name or from the attribute extraction process. If it is not populated correctly then manually enter the correct document numbers.

7. The **Get Document Details** option can be used at this point to retrieve document metadata from previously uploaded revisions in OR to populate drop-down boxes in the XL-Upload spread sheet. (See Section 3.3 below for more information on this useful feature.)

8. If you did not use Extract attributes and/or Get Document Details, populate the remainder of the fields in the Excel workbook with the appropriate details of the documents (i.e. Rev, Status, Category, Discipline and Title). These should match the fields that have been set up on the project. Repeat from **Step 2** above to add/upload additional documents.

9. Click the XL-Upload menu and select **Validate Documents**. If you attempt to upload documents without validating, it will automatically prompt you validate the documents.

10. Click the XL-Upload menu and select **Direct Upload**.

| NOTE | a. | Direct Upload directly uploads files via the internet in real time including files over 100 MB. |
| | b. | Documents can be uploaded via email by selecting the first option from the More menu. The documents is zipped up by XL-Upload and, together with the attribute data in the spread sheet, emailed to through your normal email system. |

3.2 DOCUMENT VALIDATION FROM WITHIN XL-UPLOAD

XL-Upload users can perform document validations directly from within the program. This allows users to check that their documents pass all necessary validations prior to uploading the documents to .

To perform a document validation:

1. Load the XL-Upload Excel workbook.

2. Populate the necessary details in the spread sheet.

3. From the XL-Upload menu, select **Validate Documents**.

4. Enter your User ID, Company ID and Password.

5. Click **Login**.

The system will now take the information from the XL-Upload spread sheet and perform a number of validations on the information based on the project setup in .

If the documents pass all validations, the system will return a message saying that the documents have passed validation.

If the documents fail validation, the system will return a message saying that the documents have failed validation, and the documents failing will be highlighted in **RED** in XL-Upload.

Scroll to right of the worksheet and you will now find an Errors column next to the Remarks column in which XL-Upload will note the reasons why the documents have failed validation.

In the Document No. field you will also find comments which detail why the validation has failed. Move the mouse over this field (noted with a small red triangle in the corner) to see these comments.

Once you have amended the issues, you will need to clear the errors before attempting again. To do this select **Clear All Errors** in the XL-Upload menu and then repeat the Validation process.

3.3 UPLOADING REVISED DOCUMENTS

Revised Documents (new revisions of existing documents) can be uploaded; however XL-Upload has a unique feature to further simplify the process of uploading revised documents.

The **Get Document Details** option can be used to retrieve document metadata from previously uploaded revisions in , saving data entry time. Additionally, it populates drop-down boxes in the XL-Upload spread sheet. This is handy, as you will not have to memorise the metadata codes from the project.

> **NOTE** This feature can be used even when documents have not been uploaded previously. You will get an error message which says 'Document Not Available' indicating that it is not currently in the Document Register; however the drop-down boxes will still be available to you.

3.3.0.1 To upload revised documents:

1. Load the XL-Upload Excel workbook.

2. If necessary, select **Clear Sheet** from the XL-Upload menu to remove any existing entries.

3. Select **Add Files** from the XL-Upload menu.

4. Navigate to the file(s) location on your computer/network.

5. Select the file(s) that you wish to upload and click **Open**.

6. Now enter the Document numbers only for each document.

7. Select **Get Document Details** from the XL-Upload menu.

8. Enter your login details for when prompted and click **Login**.

The system will now access the server and search for the document numbers that you have entered. Once found, the system will download the existing attributes for the last uploaded revision of that document number.

9. Now, simply change the revision and/or status of the documents as required.

10. Select **Validate Documents**, then **Upload Documents** from the XL-Upload menu.

> **NOTE**
> a. If the document number that you have entered does not exist, the system will highlight this document in red and add a comment advising that this document does not exist in – "Document Not Available".
>
> b. To change the document title, select the More option and click Mark Title As Changed. This will add a double asterisk to the end of the title and force the change through to .
>
> c. To clear all entries in the XL-Upload worksheet select Clear Sheet from the XL-Upload menu.

3.4 ATTRIBUTE EXTRACTION

XL-Upload can automatically extract the document attributes from Microsoft Office (Word, Excel and PowerPoint) files and PDF files in addition to AutoCAD DWG files. In order to use this feature, the attribute mapping needs to be set up in XL-Upload. The attribute mapping will map the fields on the attribute block to the fields.

3.4.1 AutoCAD Attribute Mapping

To set up attribute mapping for DWG files:

1. Load the XL-Upload Excel workbook.

2. Select **Attribute Mapping** from the XL-Upload menu.

3. Click the field name that you wish to map.

4. Enter AutoCAD Attribute values in the text box corresponding to the field name in the CAD title block.

5. Click **Update**.

3.4.2 PDF Attribute Mapping

If you have a number of PDF files that have document attributes such as Document No, Title, Rev etc. in a consistent location (E.g. based off the same title block), you can now use XL-Upload to read these attributes directly from the PDF files.

To extract the attributes:

1. Select **Defaults**.

2. Set the Attribute Extraction method for PDF files to **PDF Text Extraction**.

3. Select **More**, then Define **PDF Attribute Regions**.
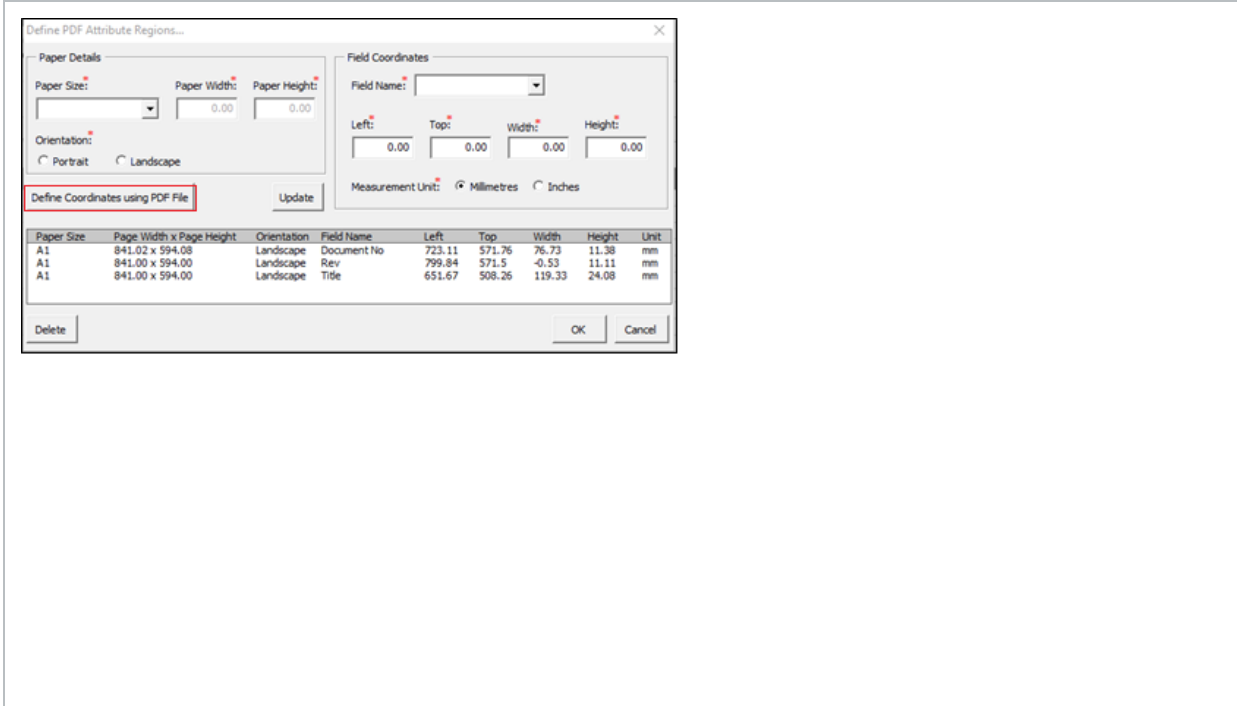
4. List the coordinates from which the attributes need to be extracted for each field and paper size. This can be defined directly using a sample file by clicking **Define Co-ordinates using PDF** file and drawing a rectangle to mark the co-ordinates.

5. Click **Extract Attributes**.

CHAPTER 4 — ADDITIONAL XL-UPLOAD OPTIONS

4.1 MORE XL-UPLOAD OPTIONS

Upload Documents via Email: Documents will be sent to your email outbox before they are uploaded to 's Document Register. This can be used to upload the same document and metadata but with multiple file formats.

Mark Title as Changed: When revising documents in , if the titles are changed, then this needs to be manually denoted by adding ** at the end of the new title. In XL-Upload this can be automated, by selecting the rows that have the titles to be changed and selecting **More** then **Mark Title as Changed**.

List Attributes: Lists attributes against selected document such asDate, Discipline, Revision

User Profiles: If you are working on multiple projects which may have different User ID, Company ID or Email address, you can now define all of them under the more button and User Profiles which will allow you to switch between them as required.

Define PDF Attributes Regions: The coordinates attributes need to be extracted for each field and for each paper size. This can be defined directly by clicking on "Define Co-ordinates using PDF file" and drawing a rectangle to mark the co-ordinates.

4.2 XL-UPLOAD RESTRICTIONS

An XL-Upload spread sheet can be saved at any time to ensure information is not lost. It is important that when doing so, you select **Save A**s from the **File** option of the Menu Bar as to not overwrite the original file. Provided the spread sheet you are saving is located in the same folder as the original installation location, XL-Upload will work as normal.

XL-Upload cannot define which revisions of documents should be uploaded first. If multiple revisions of the same document number are to be uploaded, individual XL-Upload spread sheets should be used and each processed in sequential order. Only upload revision B documents **after all revision A documents** are confirmed successfully uploaded in your project.

4.3 ADDITIONAL XL-UPLOAD INFORMATION

For more information on XL-Upload or for contact details for select **About XL-Upload** from the XL-Upload menu. The About screen shows the support phone number that is specific to your project/region.

Alternatively contact support@ineight.com.