

Hyphen Solutions, Ltd.

SupplyPro  
8.0 Release Notes (Part 2)  
04-28-2008



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# Contacting Customer Care

Support for SupplyPro is available from the Customer Care Center and online.

**Telephone** 877-508-2547

After Hours  
877-508-2547 or 972-728-8180

**Hours** You can reach the Customer Care Center Monday through Friday, 7 A.M. to 7 P.M., Central Standard Time.

**Email** [support@hyphensolutions.com](mailto:support@hyphensolutions.com)

**Mail** Hyphen Solutions™, Ltd.  
16301 Quorum Dr., Suite 100A  
Addison, TX 75001

**Hyphen Solutions, Ltd.** For more information about Hyphen Solutions or the other products offered by Hyphen Solutions, visit our web site [www.hyphensolutions.com](http://www.hyphensolutions.com) or call **800-To-Build** (800-862-8453).

# 6993 – Document Management

**Affected users**

All users.

**Module information**

None.

**Description**

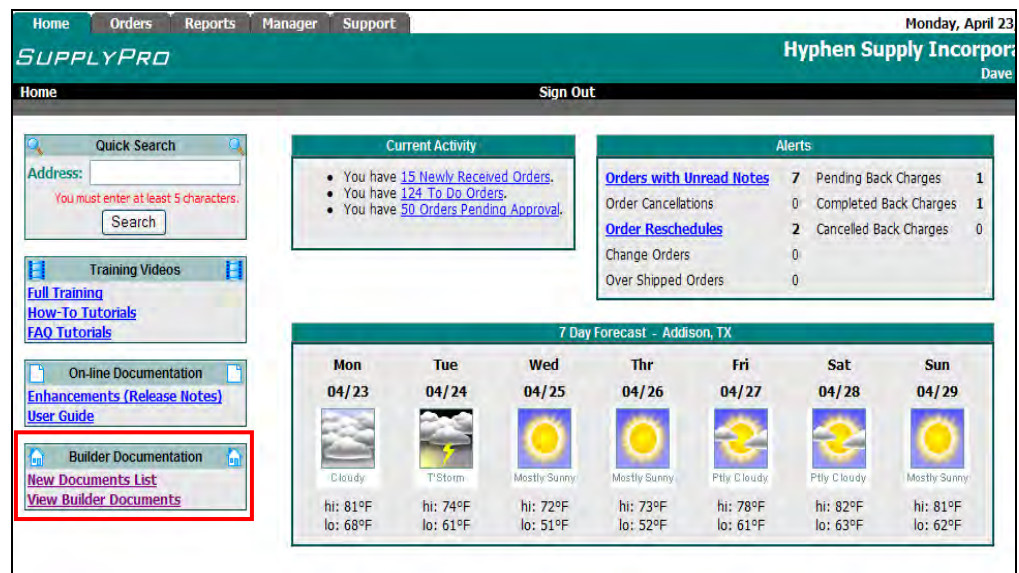
This issue greatly enhances the Document Management capability in BuildPro and SupplyPro. In SupplyPro, users can view builder documents as well as upload supplier documents. The builder controls what documents a particular supplier can view and controls whether suppliers can upload documents to different folders.

**Changes to existing functionality:**

- **Home page** – New Builder Document section on the left side of the page for Document Management.
- **Jobs with New Documents alert** – Replaced by the New Documents List in Document Management. This alert no longer exists in SupplyPro.
- **View Documents link** – This link appears on multiple pages in SupplyPro. It now takes the user directly to the job folder in Document Management that contains the document. The following pages have this link:
  - Order Detail page
  - Job Summary page
  - Job Summary Report
  - Potential Orders Report





**New Document Management functionality:**

- View newly added documents on the New Documents List.
- View documents or hyperlinks uploaded by BuildPro or SupplyPro users.
- View the history of the document as well as edit, update, or delete documents.
- Upload up to 10 new documents or 5 new hyperlinks at a time.



## Document Management Roles

A user must have at least one Document Management role to access Document Management:

- **Document Viewer Role** – Allows the user to view existing documents but not to upload new documents or change any existing documents. All Document Management roles can view the Document History by clicking the  **History** icon on the View/Manage Documents page.
- **Document Admin Role** – Allows the user to perform all Document Viewer functions. This role also allows the user to view, edit, update, and delete existing documents as well as upload new documents. Edit, update, or delete a document using the  **Edit**,  **Update**, and  **Delete** icons on the View/Manage Documents page.

## Document Management Rules

### Document Management Rules:

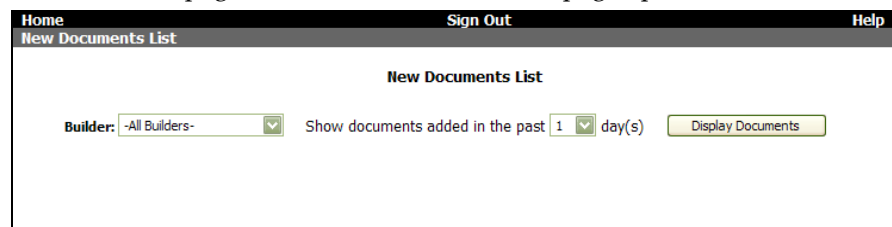
- A SupplyPro user cannot edit, update, or delete a document uploaded by a BuildPro user or by a SupplyPro user from a different SupplyPro company.
- A BuildPro user cannot edit, update, or delete a document uploaded by a SupplyPro user.
- A BuildPro admin chooses whether SupplyPro users can access each folder. A SupplyPro user can only view/upload documents to a folder where the builder allows supplier access.
- Each time a BuildPro user uploads a document, he or she can choose specific suppliers who can view the document. If the BuildPro user does not choose specific suppliers, the document can be accessed by all SupplyPro users.
- BuildPro users can view all SupplyPro documents for suppliers assigned to their org level.

## View New Documents List

(Replaces the New Job Documents alert)

### To view the New Documents List:

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



Home Sign Out Help

New Documents List

New Documents List

Builder: -All Builders- Show documents added in the past 1 day(s) Display Documents

- Choose the builder you want to view from the **Builder** drop-down list.
- Choose the **Number of Days** for which you want to view new documents. Click the **Display Documents** button. The list of new documents appears.

Builder	Folder	Doc/Link Name	Type	Size	Rev	Date Added
Hyphen Builders	Hyphen Builders	<a href="#">Hyphen University</a>	🔒	0 Bytes	1	3/31/2008
Hyphen Builders	Southeast Region	<a href="#">Doc 1A</a>	📄	48.12 KB	1	3/31/2008
Hyphen Builders	00230 - Tampa Division	<a href="#">Doc 1A</a>	📄	48.12 KB	1	3/31/2008
Hyphen Builders	0471201 - Silver Ridge	<a href="#">Doc 1A</a>	📄	48.12 KB	1	3/31/2008
Hyphen Builders	Phase 0	<a href="#">Doc 1A</a>	📄	48.12 KB	1	3/31/2008
Hyphen Builders	04712010067 - 15851 DURANGO CIRCLE	<a href="#">Doc 1A</a>	📄	48.12 KB	1	3/31/2008
Hyphen Builders	04712010067 - 15851 DURANGO CIRCLE	<a href="#">Release Notes</a>	🔒	0 Bytes	1	3/31/2008
Hyphen Builders	04712010068 - 15839 DURANGO CIRCLE	<a href="#">Doc 1A</a>	📄	48.12 KB	1	3/31/2008

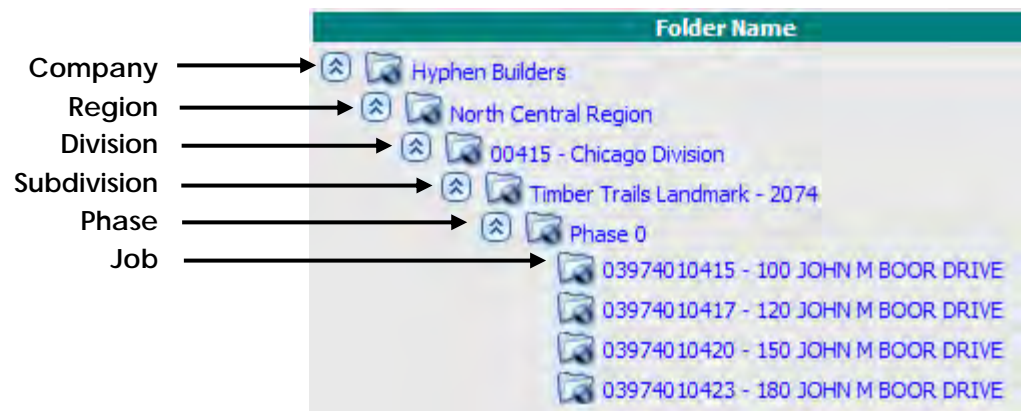
- To view the document, click on the **Doc Name**. The document opens.
- To help you locate the document on the View Builder Documents page, note the document's folder name in the **Folder** column.  
*Note:* The folder name is not a hyperlink.

## Navigate Through the Builder Documents

When navigating through the builder documents in SupplyPro, remember that the folder structure for each builder follows the builder's organizational structure.

For example, to view documents for the **Job** 100 JOHN M BOOR DRIVE, you must expand the Hyphen Builders **Company**, North Central **Region**, Chicago **Division**, Timber Trails Landmark **Subdivision**, and **Phase** 0 to view the correct job folder. Click on the **Job** folder to view the list of documents.

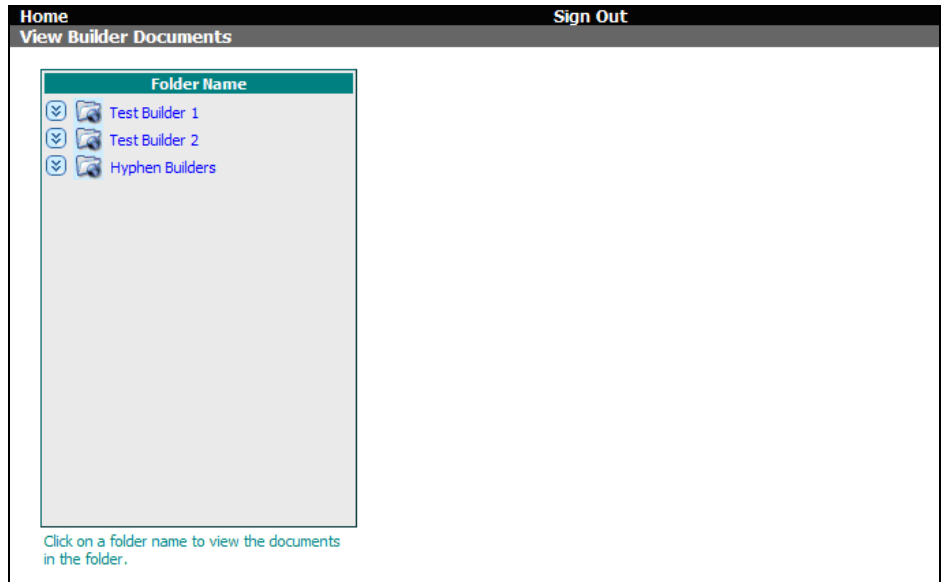
*Note:* Not all builders have regions.





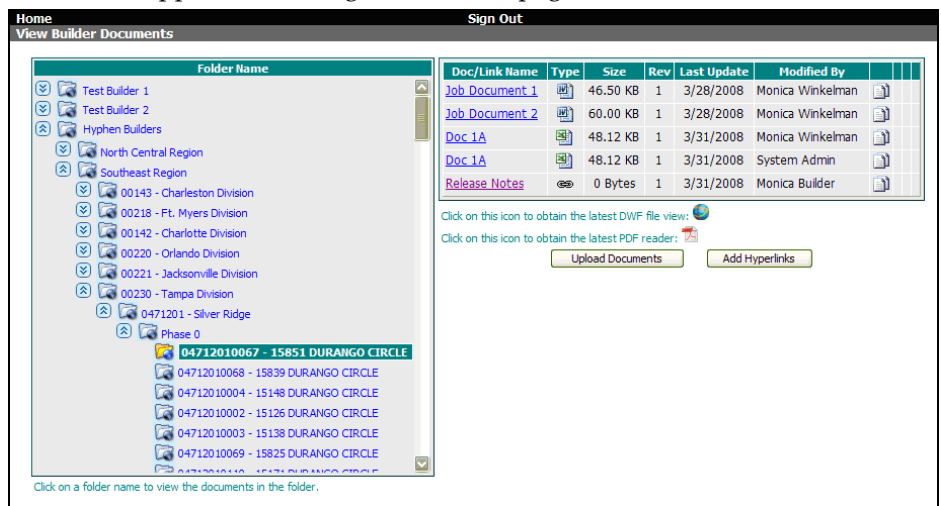
## View Builder Documents

### To view Builder Documents:





















1. Log into SupplyPro. The Home page opens.
2. Click on the **View Builder Documents** link in the **Builder Documentation** box on the left side of the page. The View Builder Documents page opens.

















3. Click on the  down arrow next to a folder to view its subfolders. The down arrow changes to an  up arrow.
4. Click on the **Folder Name** to view the folder's documents. The list of documents appears on the right side of the page.



View Builder  
Documents – Page  
Columns

Doc/Link Name	Type	Size	Rev	Last Update	Modified By				
<a href="#">Migration Instructions 1</a>		35.00 KB	1	3/31/2008	Monica Builder				
<a href="#">job</a>		19.50 KB	1	3/31/2008	Monica Builder				
<a href="#">Doc 1B</a>		32.99 KB	1	3/31/2008	Monica Supplier				
<a href="#">Doc 1C</a>		48.12 KB	1	3/31/2008	Monica Supplier				
<a href="#">Doc 1A</a>		48.12 KB	1	3/31/2008	Monica Builder				
<a href="#">Hyphen University</a>		0 Bytes	1	3/31/2008	Monica Supplier				

**Note:** Even if the user is a Document Admin and has edit/delete rights, documents uploaded by BuildPro users or other SupplyPro companies will not display all of the icons.


- **Doc/Link Name** – Name of document or name of hyperlink. Click on this link to open the document or hyperlink in a new window.
- **Type** – Displays an icon for the document type or hyperlink:  DOC,  PDF,  RTF,  XLS,  GIF,  JPG,  PNG,  TIF,  DWF, or  Hyperlink.
- **Size** – The file size of the document. Max of 2 MB.
- **Rev** – The version number of the document.
- **Last Update** - The last time the document was modified in the system (e.g., document upload, document replaced, etc.)
- **Modified By** - The name of the user who last modified the document/hyperlink
- **History**  – Allows a user to view the history of a document in a pop-up window. Reading/viewing is not tracked for hyperlinks.
- **Edit**  – Allows an admin user to edit information about the document or hyperlink.
- **Update**  – Allows an admin user to replace the existing version of a document with a new one. The Update functionality is not used for hyperlinks.
- **Delete**  – Allows an admin user to delete a document or link.

## Document Viewer – Role Functions

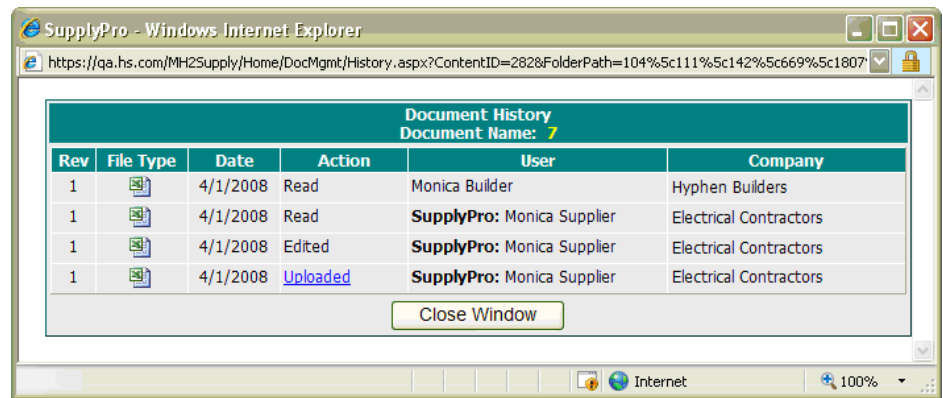
The Document Viewer role allows the user to view existing documents but not to upload new documents or change any existing documents.

### To view documents:

1. Open the **View/Manage Documents** page. Open the appropriate folder.
2. Click on the **Document 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.

**Note:** SupplyPro users only see activity on the History pop-up window from the builder and other users in their SupplyPro company.




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

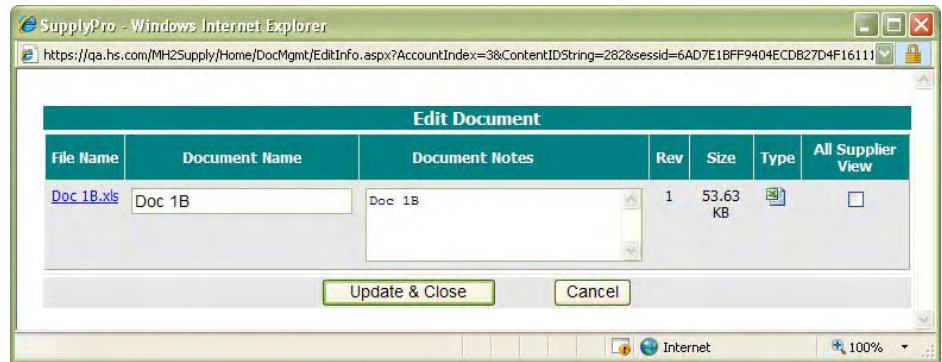
## Document Admin – Role Functions

The Document Admin role allows the user to perform all Document Viewer functions. This role also allows the user to view, edit, update, and delete existing documents. Document Admins can also upload new documents.

**Note:** SupplyPro users cannot delete documents uploaded by BuildPro users or by users from other SupplyPro companies


### To edit an existing document:

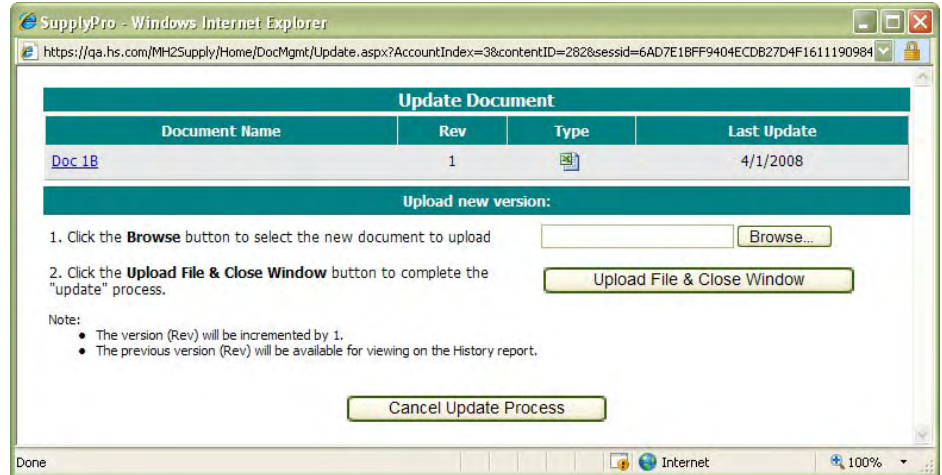
1. Open the View/Manage Documents page. Open the appropriate folder.
2. Click on the  **Edit** icon on the right side of the document row. The Edit Document pop-up window opens.




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


### To update an existing document:

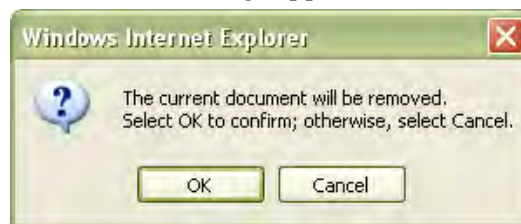
1. Open the View/Manage Documents page. Open the appropriate folder.
2. Click on the  **Update** icon on the right side of the document row. The Update Document pop-up window opens.



3. Click on the **Browse...** button. The Open File dialog box opens.
4. 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.
5. Click the **Upload Files & Close Window** button. The document appears in the document list in place of the previous version of the document.
6. To view changes to the document, view the  **Document History**.

### To delete a document:

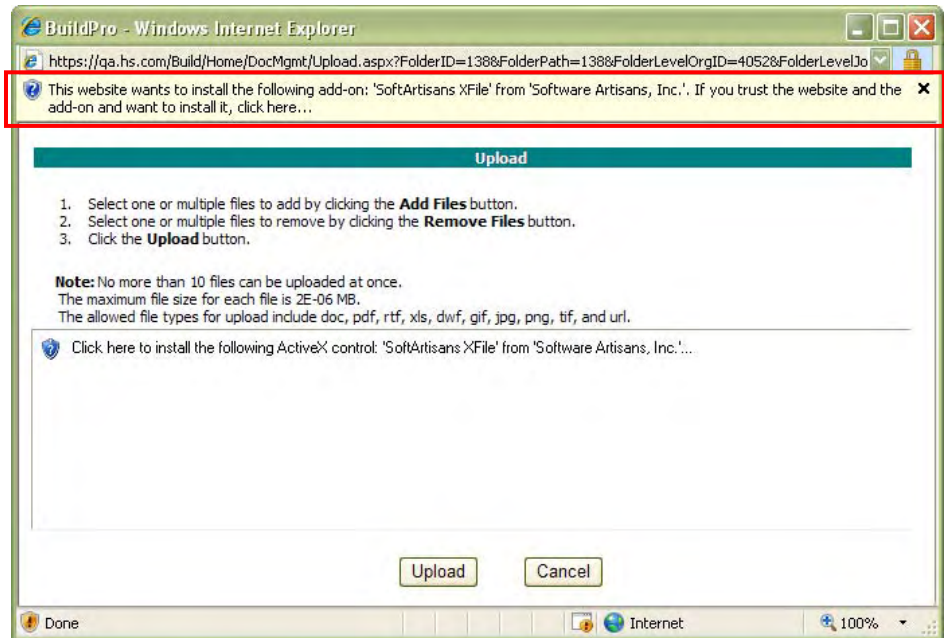
1. Open the View/Manage Documents page. Open the appropriate folder.
2. Click on the  **Delete** icon on the right side of the document row. A confirmation message appears.



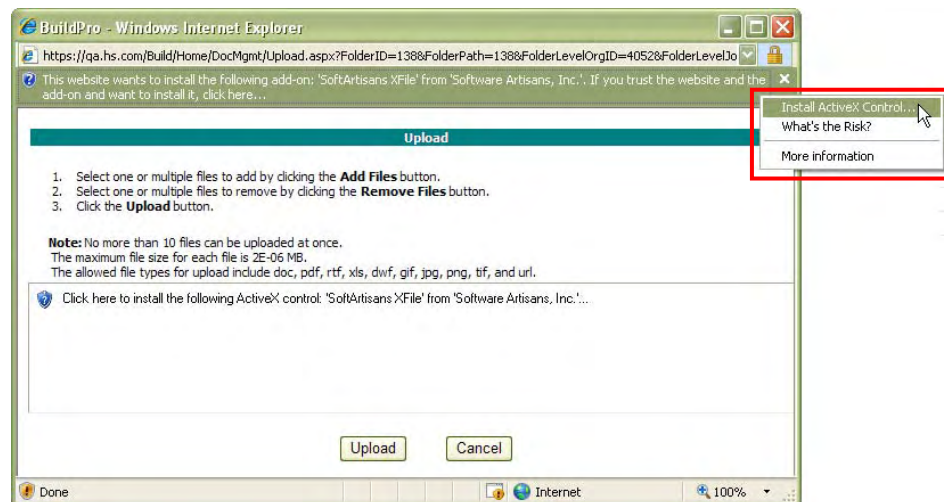
3. Click **OK** to delete the document. Or, click **Cancel** to close the message without deleting the document.

## To upload a new document:

1. Open the View/Manage Documents page. Open the appropriate folder.
2. Click on the **Upload Documents** button at the bottom of the page. The Upload pop-up window opens.
3. The first time you open this pop-up window, you may be asked to install an **ActiveX Control** called **SoftArtisans XFile**. This control is necessary for uploading documents. Click on the light yellow bar at the top of the pop-up window.



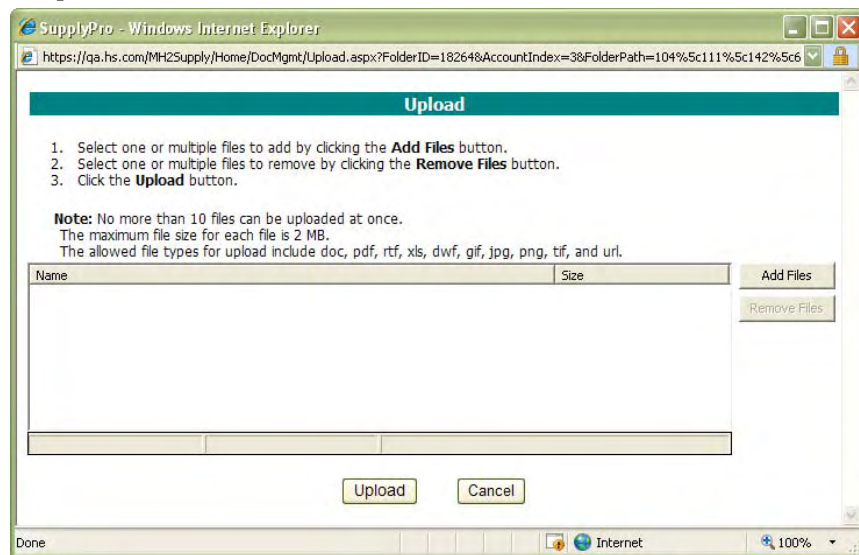
4. Choose **Install ActiveX Control** from the pop-up menu.



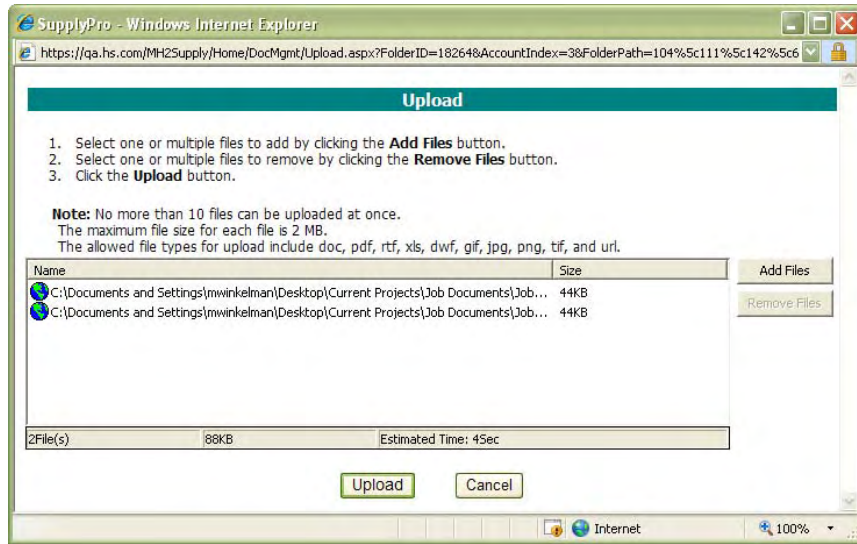
5. On the Security Warning pop-up window, click on the **Install** button.



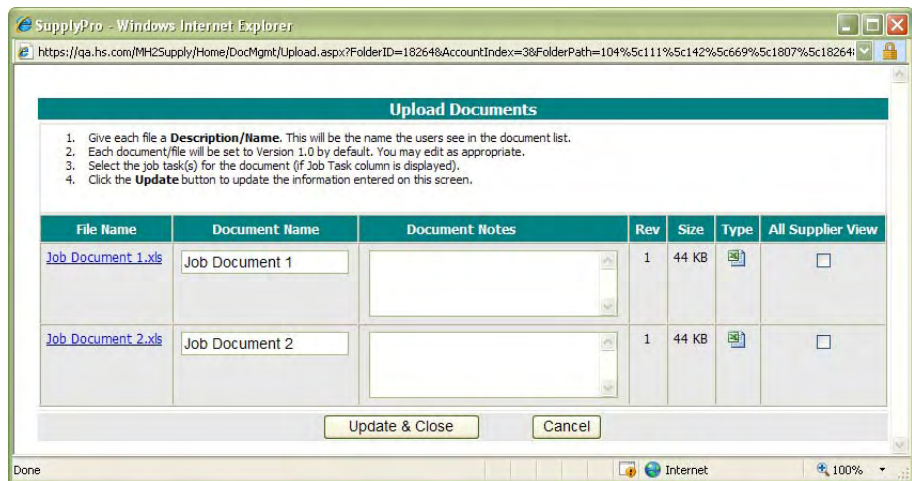
6. The ActiveX Control installs, and the Upload pop-up window is ready for you to upload documents.



7. **Click** on the **Add Files** button. The Add File dialog box opens
8. Locate the document you want to upload. Click on the file to select it. To select multiple documents, hold down the **Ctrl** key while clicking on each document.
9. Click on the **Add** button. The file(s) you selected appear in the Upload pop-up window.



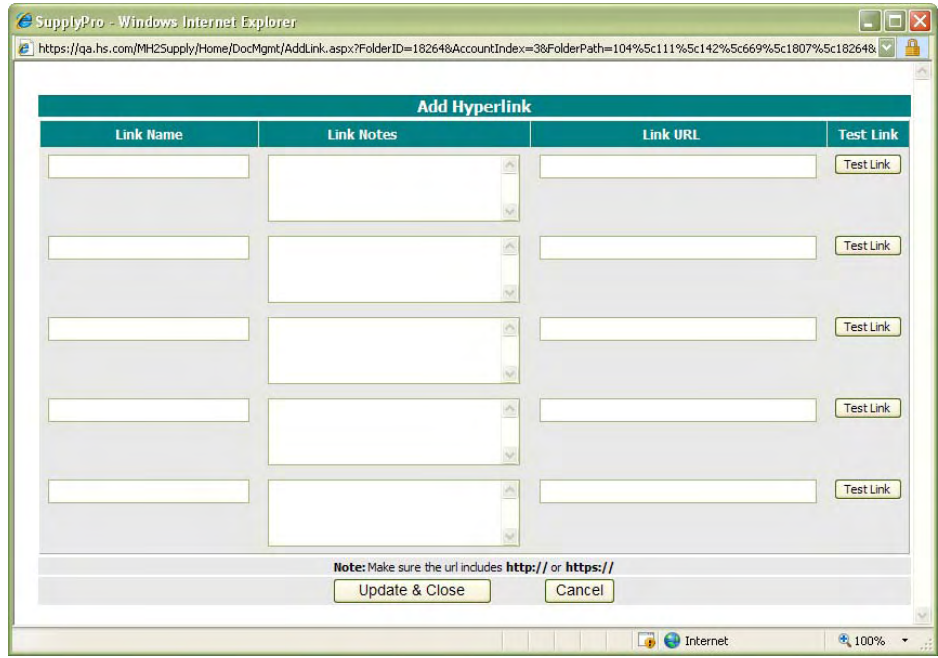
10. Click the **Upload** button. The Upload Documents pop-up window opens.
11. For each document, enter a **Document Name** and **Document Notes**.



12. Click the **All Supplier View** check box at the end of each document row to allow all suppliers, including those from other SupplyPro companies, to view this document. Leave it **unchecked** to allow only the builder and other users in your company to view the document.
13. After you have entered information for all documents, click the **Update & Close** button on the Upload Documents pop-up window. The new document(s) appears on the document list.

**To upload a new hyperlink:**

1. Open the View/Manage Documents page. Open the appropriate folder.
2. Click on the **Add Hyperlinks** button at the bottom of the page. The Add Hyperlink pop-up window opens.



3. Enter the **Link Name**, which will be displayed in the document list.
4. Enter the **Link Notes**, which will appear as a tool tip when the user places the cursor over the link.
5. Enter the **Link URL**, including the **http://** or **https://**.
6. Click the **Test Link** button to test that the link opens the correct web page. The web page opens in a new window.
7. On the Add Hyperlink pop-up window, click the **Update & Close** button. The link appears in the document list.

Doc/Link Name	Type	Size	Rev	Last Update	Modified By				
<a href="#">Release Notes</a>		0 Bytes	1	3/31/2008	Monica Builder				
<a href="#">Doc 1A</a>		48.12 KB	1	4/1/2008	Monica Builder				
<a href="#">Job Document 1</a>		44.00 KB	1	4/1/2008	Monica Supplier				
<a href="#">Job Document 2</a>		44.00 KB	1	4/1/2008	Monica Supplier				
<a href="#">Hyphen University</a>		0 Bytes	1	4/1/2008	Monica Supplier				

