Quick Start Guide

www.constructiononline.com
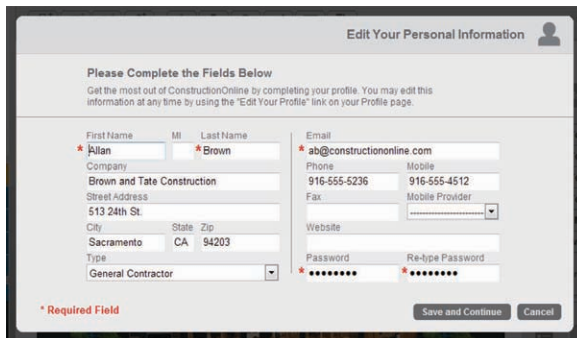
ConstructionOnline™
Quick Start Guide

UDA Construction Online™

Thank you for joining ConstructionOnline™! Once you have signed up and activated your account, you will be guided through the 3-step profile creation process.

1 Edit Your Personal Information
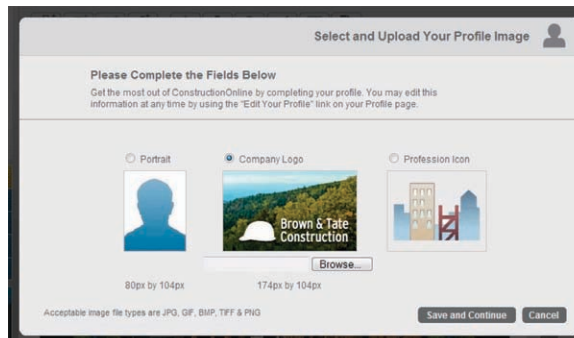
Enter your name, company, profession type, and contact information here. You may edit this information at any time by clicking "Edit My Profile" on your Profile page.

2 Select and Upload Your Profile Image

Choose the image or company logo you wish to use for your profile. The image you choose will upload after you click "Save and Continue". You may also choose to use the profession icon instead.
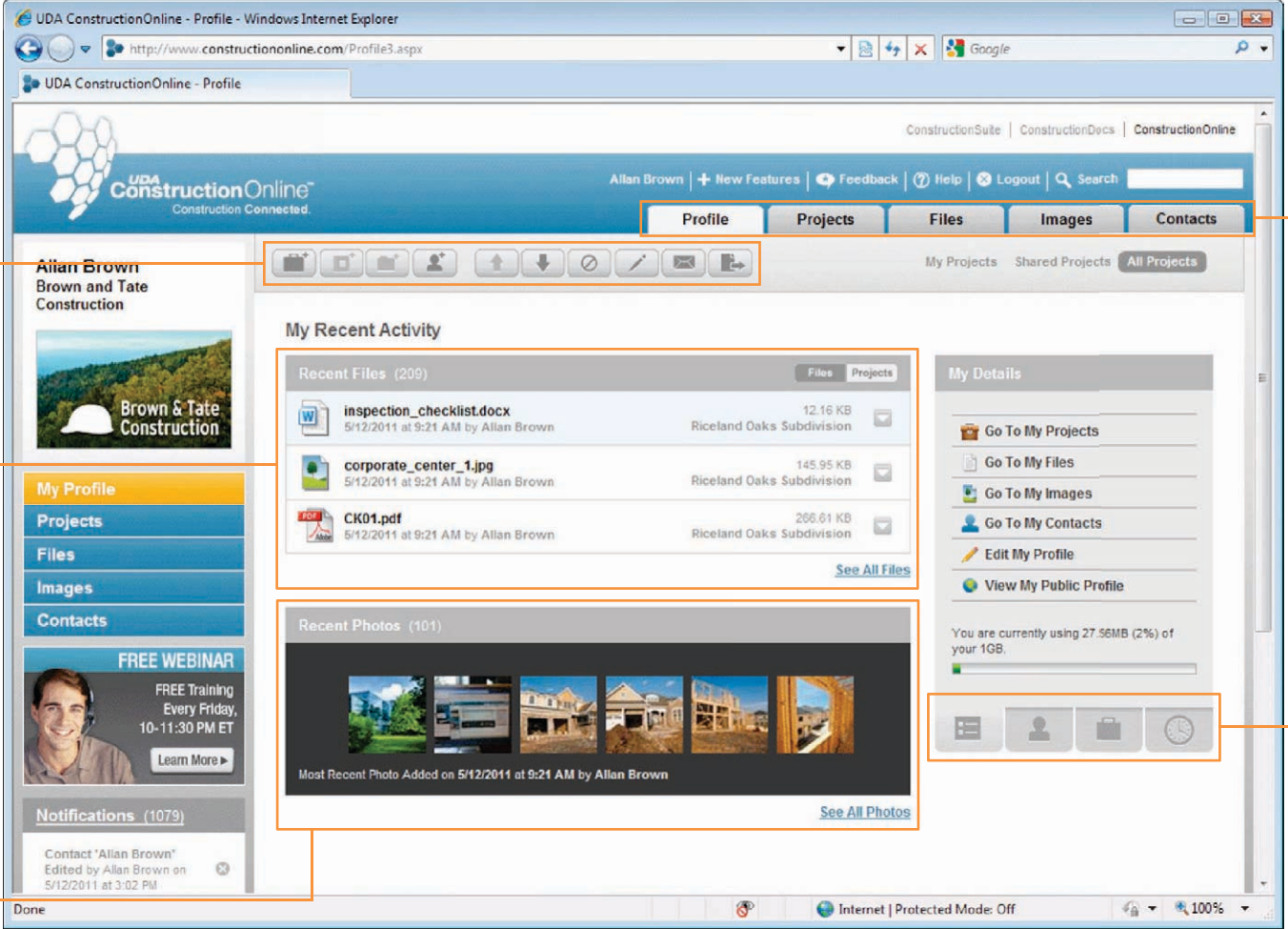
3 Choose Public Profile Settings

Choose what information is visible to others in your Public Profile. You may edit these settings at any time via the "Edit Your Profile" link on your Profile page.

Once you have entered your information, you will be able to view
your **Profile** page. An overview of the **Profile** page is shown below.

Toolbar Buttons
These perform functions such as adding new projects, uploading, sharing, editing, etc.

Recent Projects/Files
The latest project and file activity at a glance.

Recent Photos
The latest photos uploaded to your projects will be displayed here.

Navigation Tabs
Easily move among the main areas of ConstructionOnline with these tabs.

Sidebar Buttons
Change the type of information displayed in the sidebar with these buttons.

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Before you can begin uploading Files and Photos to your account,
you must create a new **Project**.

1 Click the "Add Project" Toolbar Button
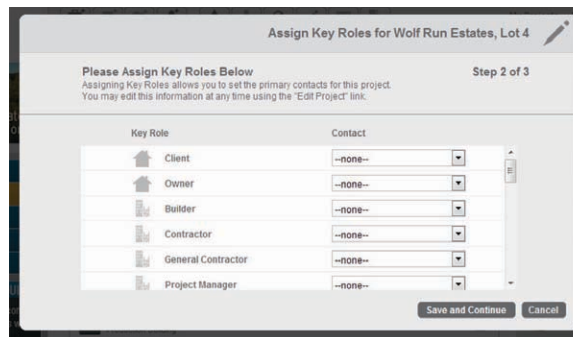
2 Create New Project

Enter the project information in the appropriate fields.
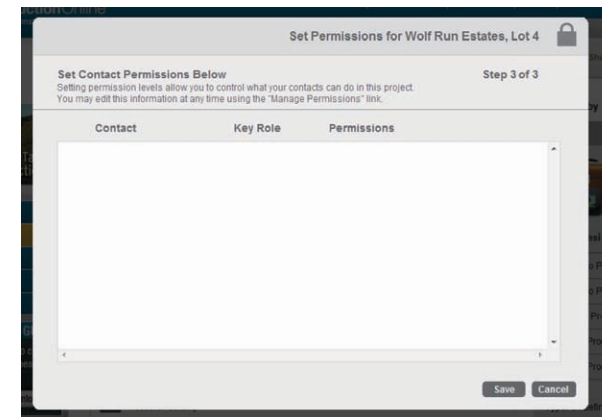
3 Assign Key Roles for the Project

Because you do not have contacts yet, you will not be able to assign key roles yet. Don't worry, you can do it later by clicking the "Edit Project" toolbar button.

3 Set Permissions for the Project

You cannot set permissions until you have contacts. Once you have contacts, you may manage permissions for the project by clicking the "Edit Project" toolbar button.

4 Your Project is Created

Wolf Run Estates, Lot 4
Single-family Residential
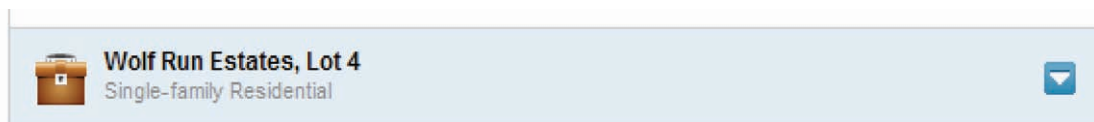
Now that you've created a new Project,
you can begin **Uploading Files and Photos**.

To Upload Files and Images:

1 Click the Projects Tab.
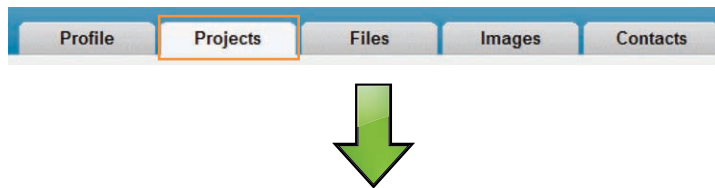
Click in the row of the Project you wish to upload to.
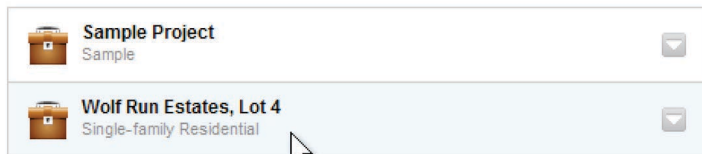
2 Click the "Upload" toolbar button. The Upload window will open.
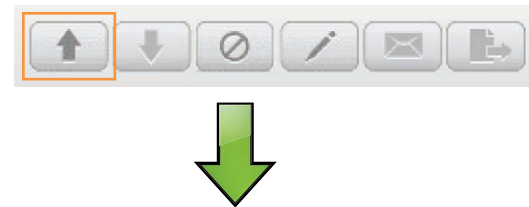
Click the "Browse" button to choose the files or images you wish to upload.

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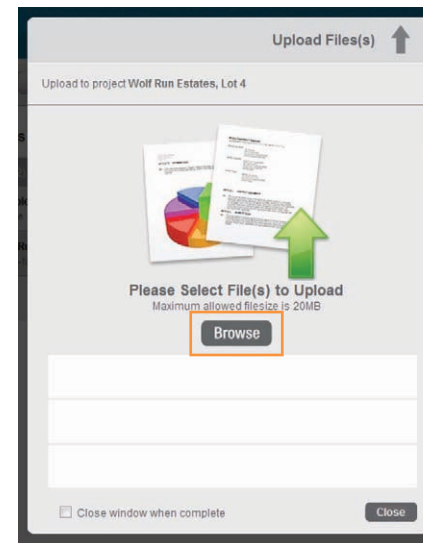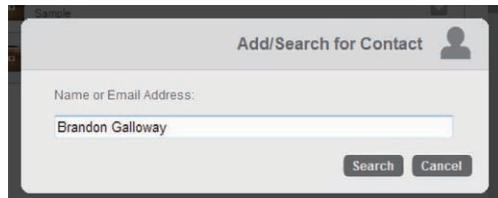
You can now **Add Contacts** and **Invite** them to join your Projects.

To Add and Invite Contacts:

1 Click the "Add Contact" toolbar button. The Enter Contact's Email window will open.
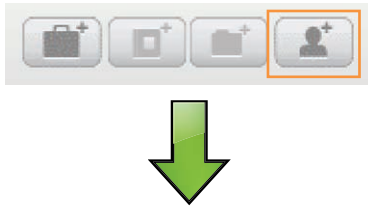
Enter the name or email address of the contact you want to add. ConstructionOnline will search the member database for this information.

2 Your search results will be shown. If you see the contact you wish to add, click the "Add" button next to the contact.
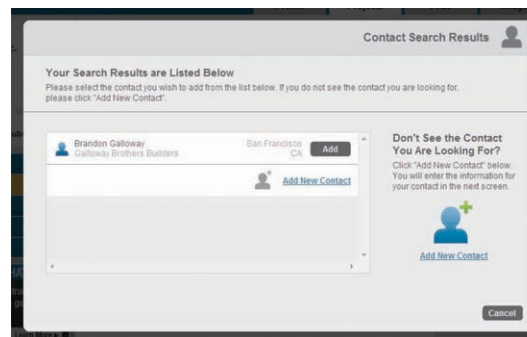
Additional contact information will be displayed. Confirm that this is the contact you want to add and click "Save and Continue".
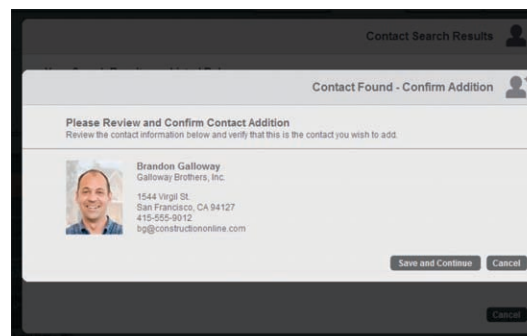
3 You can now invite the contact to join your projects. This is also where you can set permissions for the contact. The contact will receive an email inviting them to join the project.
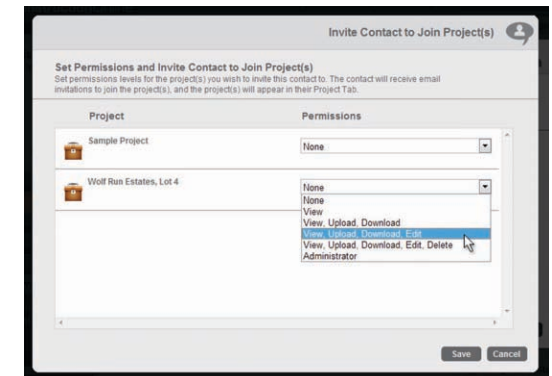
You can also **Invite Contacts** directly
to a Project via the Action Menu.

To Invite Contacts to Join a Project from the Action Menu

1 Click the Action Button for the project you wish to invite contacts to and click "Invite".

2 Set permissions for a single contact or multiple contacts.

3 The project will appear in your invited contact's project list and they will receive an email inviting them to join the project.

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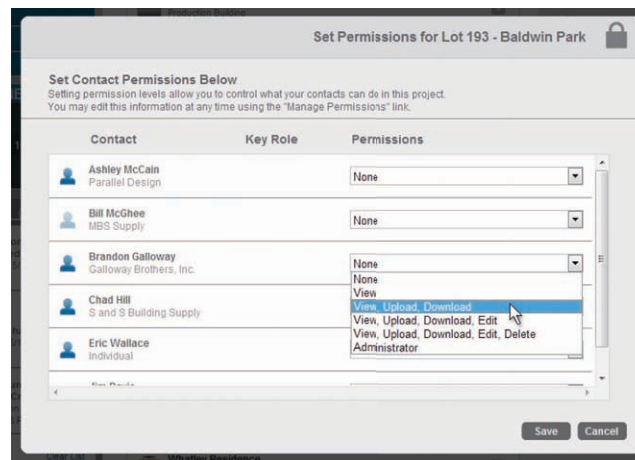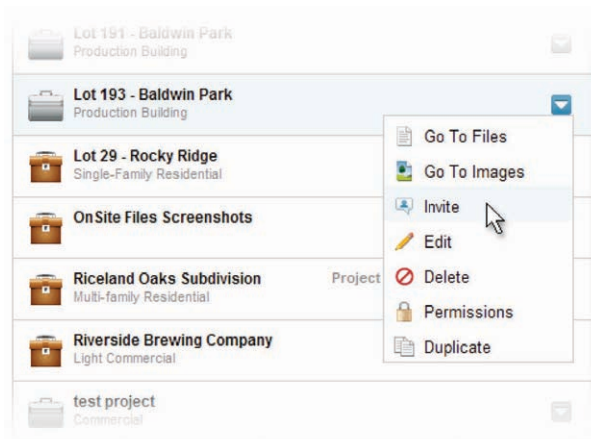
Setting Folder Permissions can give you even more control
over which contacts can do what in your projects.

To Set Permissions on a Folder*

1 Click the Action Button for the folder you wish to set
permissions for.
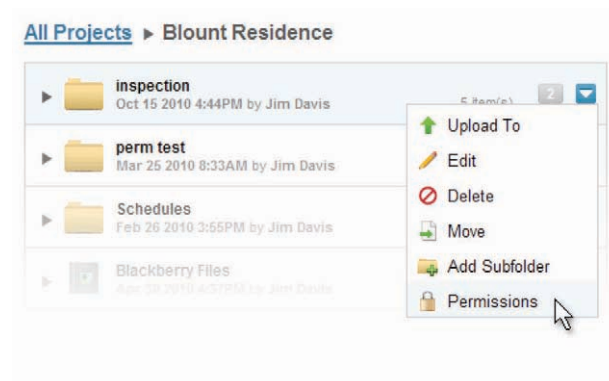
2 Set permissions on the folder for a single contact or
multiple contacts.**
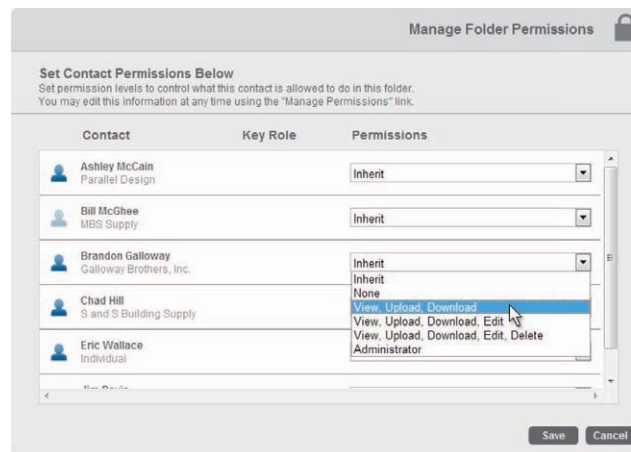
3 You can view the current permission
settings on the folder by clicking the
Permissions icon in the right side bar.
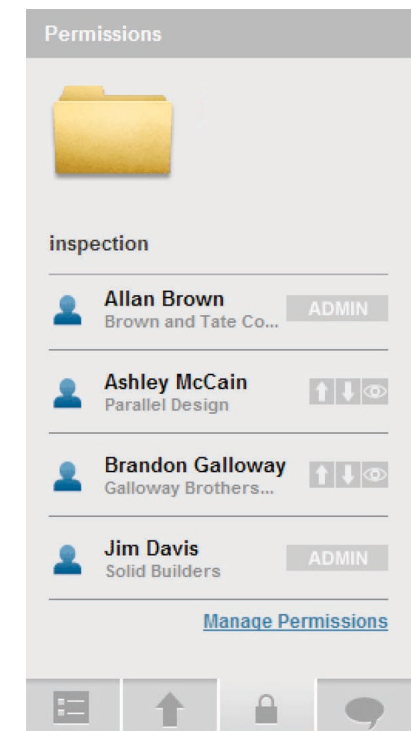
*Folder permissions are inherited from project permissions by default.

**Assigning a "None" permission on a folder means that that contact
will not see the folder at all in their file list.

Use the **Toolbar Buttons** to perform most functions in ConstructionOnline™.
What each button does is described below.
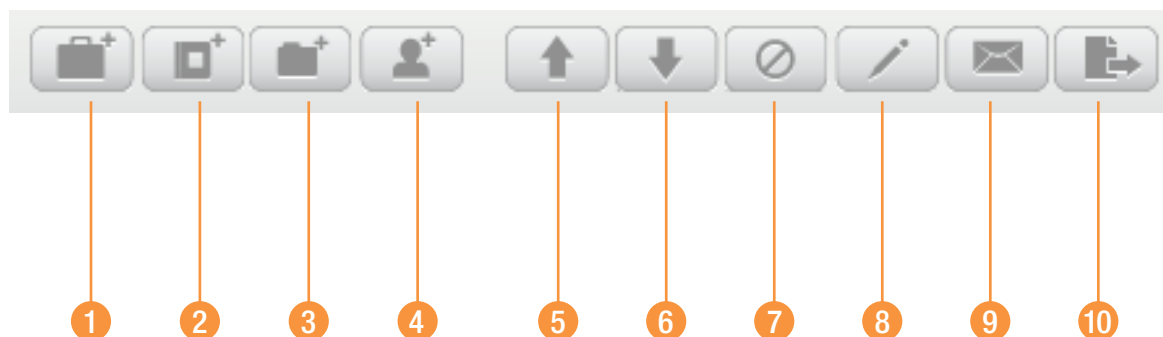
1   Add New Project
New projects will show in your projects list under the Projects and Files Tabs.

2   Add New Image Album
New albums will show under the Images Tab. They will also show in the Files List of the Project containing the new album.

3   Add New Folder
New folders will show in the Files List of the Project containing the new folder.

4   Add New Contact
New contacts will show in your Contact List under the Contacts Tab.

5   Upload File or Image
Files and images can be uploaded into Projects, Folders, and Albums. Albums are designed to hold images. While an album can contain a non-image file, that file will not be visible in the Gallery View.

6   Download File or Image
Select the row of a file or image in the Files List and click this button to download that file or image. The file or image will download to your default download location (usually your Desktop).

7   Delete
This button allows you to delete projects, folders, albums, images, files, and contacts. You will be asked to confirm deletion before it occurs.

8   Edit
This button allows you to edit projects, folders, albums, images, files, and contacts.

9   Share
This button allows you to share images and files. You will be asked to enter the email address of the recipient, who will receive a link to the file or image via email.

10   Move File or Image
This button allows you to move files and images from one location to another.

Note

Not all toolbar buttons are active all the time. For example, if you are in your Project List view, the Download and Share buttons will be deactivated because these actions do not apply to projects.

The **Action Button** is found on the right hand side of Projects, Files, and Contacts Lists. Clicking on this button brings up a context-sensitive menu of actions.

Project Actions
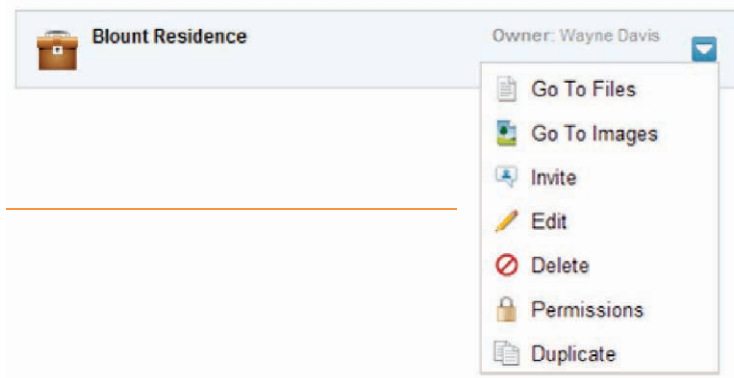
File Actions
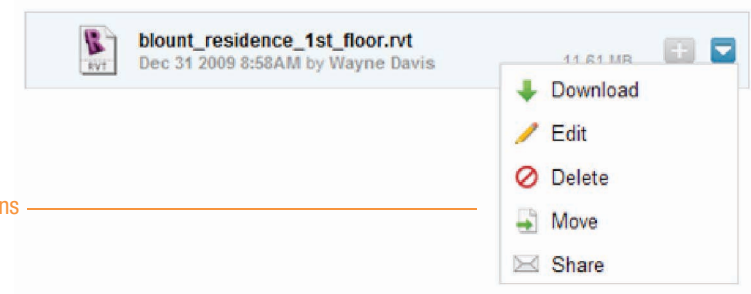
Folder Actions

Contact Actions

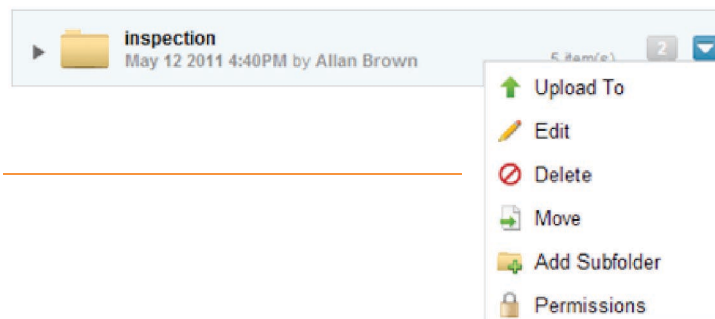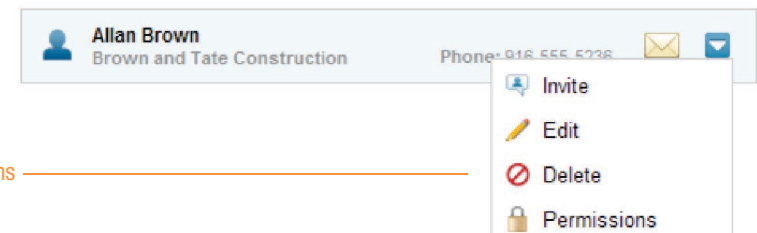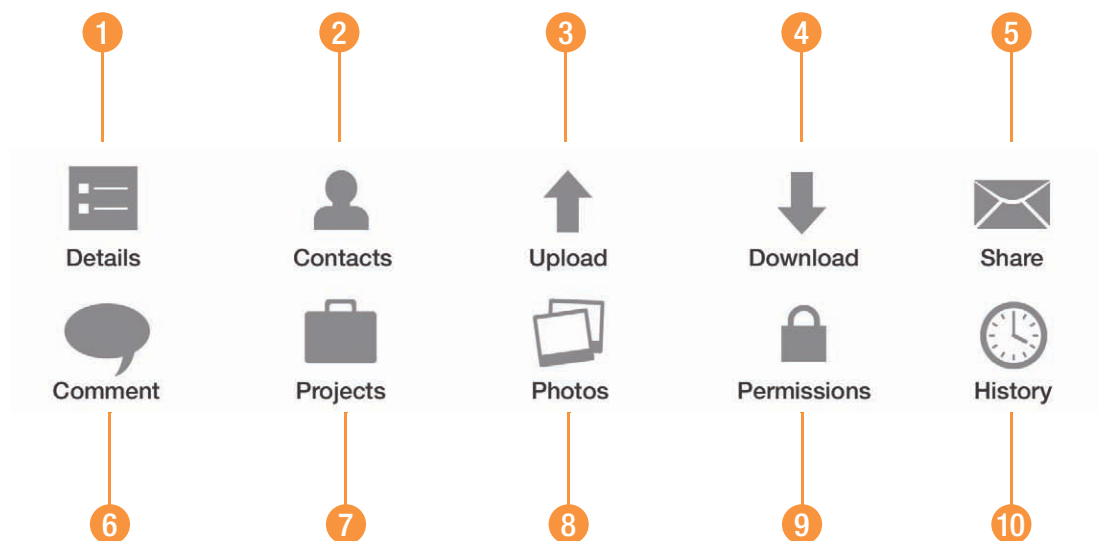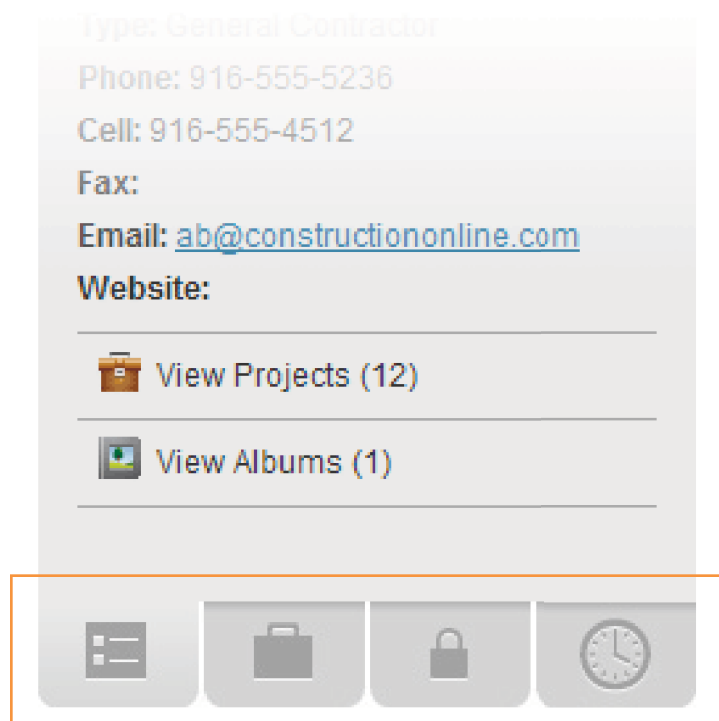**Sidebar Actions** are found at the bottom of the right-hand sidebars. These allow you to change the information displayed in the sidebar or perform actions.

Type: General Contractor

Phone: 916-555-5236

Cell: 916-555-4512

Fax:

Email: ab@constructiononline.com

Website:

📦 View Projects (12)

🖼 View Albums (1)

1 Details

2 Contacts

3 Upload

4 Download

5 Share

6 Comment

7 Projects

8 Photos

9 Permissions

10 History

1 **Details**
View details about projects, folders, albums, files, images and contacts.

2 **Contacts**
View contacts related to the item you have selected.

3 **Upload File or Image**
Upload file or image into projects, folders and albums.

4 **Download File or Image**
Download file or image to your default download location on your computer.

5 **Share File or Image**
Share a file or image with anyone with access to email.

6 **Comment**
View and add comments to projects, folders, albums, files and images.

7 **Projects**
View projects related to a selected contact.

8 **Photos**
View recent photos related to the item you selected.

9 **Permissions**
View and set permissions for contacts.

10 **History**
View history entries for the item you selected.