# Get started with



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#### Get started

#### Web browser









iBinder.com has been adapted to the latest browser technology and has been tested with common web browsers, including Internet Explorer, Mozilla Firefox, Apple Safari and Google Chrome. iBinder.com also works with a number of other web browsers. We recommend using one of the latest versions. Most importantly, these use faster "engines" that allow pages to be displayed more quickly.

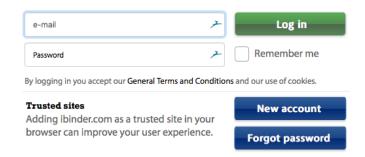
iBinder.com can also be used on handheld devices, such as smartphones and tablets, both for iOS and Android. Use the browser that is built into the device and log on as usual. Some functionality will be limited, such as uploading and using the viewer.

#### Log into iBinder.com.

Go to the address www.ibinder.com



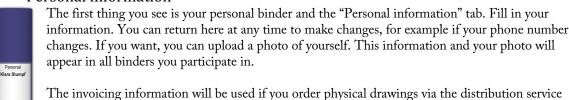
Log in by entering your e-mail address and the password you received in the attached e-mail. Choose your preferred language.



Now you have started. If you click on "Remember me", your login details will be saved until the next time you log in on the same computer.

### Your personal binder

#### Personal information



or start your own project binder. You can also change your password.

#### Settings

Under the "Settings" tab, you can change various system settings.

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When you click on a document: Here, you decide what should happen when you click on a document. By default, the iBinder viewer will open. The other feature can be reached in iBinder by ticking the check box in front of the file. If you use Internet Explorer and are allowed to install software on your computer, then you can use the ActiveX version of the viewer. This version has slightly more functionality, including a greater zoom range.

For print orders: Decide whether you want to receive receipts by e-mail.

#### Messages

Under the "Messages" tab, you will find all messages that have been sent to you from the binders you participate in. These messages will also have been sent to your regular e-mail client. You can sort them by clicking on the headings.



#### **Payers**

Under the "Payers" tab, you add payers to be used as shortcuts on your distribution pad.

#### Distribution lists

Under the "Distribution lists" tab, you can create personal distribution lists for use in projects and on your distribution pad.



To create a new distribution list, click on the "New distribution list" icon. Enter a name and save the list.



The next step is to add participants. You can search for participants in the system. You can add yourself to the list by clicking on "Add myself". Information about you will be derived from your personal information. You can also add a blank address field, to be completed manually.

#### Services

Under the "Services tab, you can choose which modules should be available when a new binder is started.

1. Choose your services

✓ iBinder Construction Project

✓ iBinder Property Management

✓ iBinder Procurement

This is also where you choose which copy shop to use and provide a default setting for your usual role and the technology area you normally cover.

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#### **Activity reports**

Under the "Activity reports" tab, you can decide how often you want to receive e-mail notifications. The activity report contains a summary of the activity in all binders you participate in, including uploaded files, new participants, deleted files, etc.,

None – Choose this option if you do not wish to receive any reports.

Daily reports – You will receive a report every weekday morning.

Weekly reports – You will receive a report every Sunday night.

**Include my own activity** – If this check box is ticked, your own activities will be included in the activity report.

#### Requisitions

In iBinder, it is possible to order physical distribution from a wide selection of copy shops. When an order has been placed, your order confirmation will appear under the Requisitions tab. This tab shows all physical orders placed.



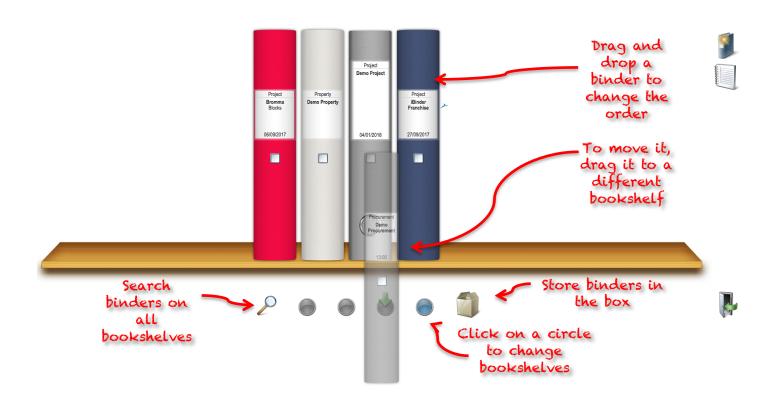
#### Back to your bookshelf

In the bottom right corner, you find the "Back to your bookshelf" symbol. By clicking on this symbol, you will always come back to your bookshelf.

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### The bookshelf

The bookshelf shows all binders you participate in, both binders you created yourself and binders you have been invited to.

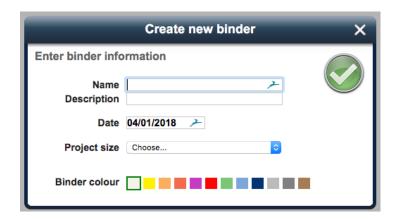


### Creating a project binder

#### Creating a new project binder



By clicking on the "Create new binder" symbol to the far right of the screen, you can easily create a new project binder. If additional modules have been activated under the "Services" tab in your personal binder, you can also choose which type of binder to start.



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Project name: Usually, you state the project's unofficial or designated name here.

Description: Here, you state the project's official name/designation.

**Date:** By default, the date when the binder was created will appear here. You can also add your preferred date.

**Project size:** Describes the construction value which is used by the system to calculate the project binder's monthly fee. Accordingly, it does not matter how much material you store or how many participants you have in the project.

If you set the construction value to "DEMO", the binder will have all the functionality of a "real" project, but it will be removed at 12.00 midnight. This is the setting to use if you want to try out iBinder free of charge.

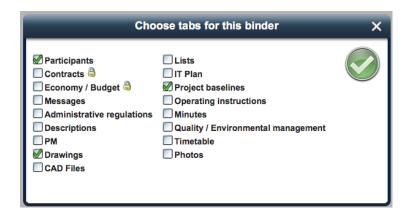
**Binder colour:** This is where you decide the colour of your project binder.



All this information can be changed later, by clicking in the box on the back of the binder and selecting the icon "View/change project information". To open the binder, click anywhere on the back of the binder, except in the box.

#### Choosing register tabs

The next step is to choose the tabs you want to include in your project binder. The "Participants" tab is always turned on by default. You add new tabs by clicking on the "Choose tabs for your binder" icon.



Tick any tabs you want to activate in your binder. Each tab has its own unique properties intended to make it easier for you to keep the documents you create organised. You should then click on the green button to add the tabs to the project binder. You can return here at any time to add or hide tabs.

A padlock is displayed next to certain tabs. This means that access to these tabs is set individually. Tabs with padlocks will not be displayed to people without access to them. You set the access rights on each tab.

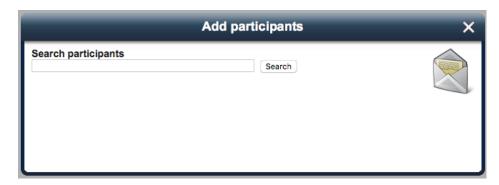
Access to other tabs, like "CAD files", "Descriptions", "Lists", "Minutes" and "Drawings", depends on the technology areas assigned to each participant. For further information, please read the section "Adding participants".

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#### Adding participants



Participants are added to your project binder by clicking on the "Add participants" icon.



You can search for participants who are already registered with iBinder.com by completing the search box. You can search on names, companies or addresses, or any combination of these. When you find the intended participant, click on the participant, and he or she will be added.



If the intended participant is not in the system, click on the Letter icon.



A box will open where you can insert the intended participant's e-mail address. An account will be created automatically, and a letter of invitation will be sent to the participant, including login details. The letter will also state who invited the participant, and to which project.



It is also possible to add participants from distribution lists created in the past. These may be distribution lists used in other projects you have access to, or distribution lists created under the "Distribution lists" tab in your personal binder.



If you want to send an e-mail to remind a participant of his or her invitation to the binder, select the relevant person(s) in your list of participants and click on the "Send invitation reminder" icon. A dialogue box will appear where you can write a message to include with the reminder.

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#### Roles and permissions of participants



The person who starts a project will automatically be an administrator. Administrators have access to the entire project binder. An administrator can also invite participants and change their roles in the project. An administrator can also appoint one or several other participants as administrators.

Other participants can be assigned one or several technology areas in the project if they are intended to store files under tabs that use technology areas, such as "Drawings", "CAD files", "Descriptions" and "Lists". You do this by selecting the user in the list of participants and clicking on the "The participant's role and technology area" icon.

	Role and permissions	×
Per Egnell, iBinder		
The participant's role		
Project Manager		
Participant permissions		
Administrator - the participa	ant has full permissions	
The participant handles or	ne or more technical areas	
	uments in his/her technical area under tabs a, for example Drawings, Descriptions and	
Acoustics	☐ Glass facades construction	
<ul> <li>✓ Architecture</li> <li>✓ Construction</li> </ul>	<ul> <li>☐ Heating and sanitation</li> <li>☐ Heating, ventilation and sanitation</li> </ul>	
Control and surveillance	_ Landscaping	
☐ Cooling	Plumbing	
☐ Electricity ☐ Elevator	<ul><li>□ Project shared</li><li>□ Sprinkler</li></ul>	
Fire	□ Ventilation	
Guest - the participant can	only view and download documents	
☐ The participant can store do	ocuments under shared tabs	

A dialogue box will be displayed with available technology areas. Tick the technology areas that should be assigned to the participant and save by clicking on the green button.

In the box "The participant's role", you can add a more descriptive text about the participant's role in the project. This information has no practical use in the binder but may be used to provide additional information to other participants.

The technology areas determine the participant's access to the project. For example, if a participant is assigned the technology area "Architecture", this user can upload documents under the heading Architecture, but not under the heading Construction.

All participants in a binder can view and download documents, even if they have not been assigned a technology area. A participant with "Guest" access can view and download documents but cannot make changes.

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### **Uploading new documents**

#### Choice of document

Navigate to the tab where you want to add documents by clicking on the appropriate tab in the register.

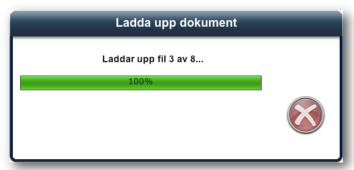


If you have permission to upload documents, the "Upload documents" icon will appear. If you cannot see this icon, then you do not have permission to do so under the tab in question. Permissions depend on the technology areas you have been assigned under the "Participants" tab.

To add documents, click on the "Upload documents" tab.

A dialogue box will appear, where you can see your local hard drive. Browse to the files you wish to add.

Select one or several files and choose "Open"; the upload will begin, and a box shows the status of the transfer.



If you need to upload additional files from a different part of your hard drive or server, repeat the process above.

#### Metadata

When the transfer is complete, you should add metadata about the documents. The number of fields to complete differs slightly depending on which tab you upload the documents to. In the following example, we explain the metadata fields for the tab "Drawings".

**Revision:** You should add the document version here. If there is already a document with the same file name under this tab, the version will automatically be given a version number +1.

Status: You should add the document status here. Select from the drop-down list.

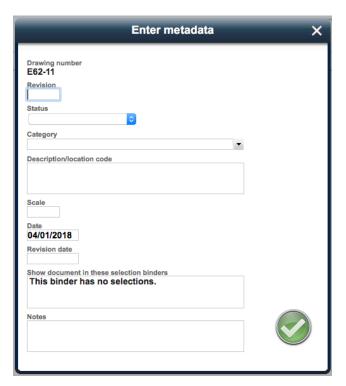
Description/location code: You should add a short description or the document's location code here.

Date: The current date will appear by default. If required, change it to the document's date.\*

Scale: Add the scale of the document here.

In case of "CAD files" tab type, the Status, Scale and Revision date cannot be set because CAD files are always more flexible, work-in-progress style documents.

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Revision date: You should enter the revision date of the document/drawing here.

Show document in these selection binders: read more about selection binders below.

**Notes:** You may add any notes you wish here.

\* The system will automatically save the date, time and person who uploaded the document. This will be displayed if you let the mouse pointer hover over a document under a tab.



There is a check box in front of each metadata field. If you tick it, you will lock the metadata value so that it is copied to all subsequent metadata cards. This is a smooth and simple way of registering metadata for several files at once.

For example, if all documents uploaded are scaled at 1:50, enter this scale in the "Scale" metadata field and lock it. A scale of 1:50 will then be added to all underlying documents.



#### Change metadata

All metadata can be changed later. You do this by selecting one or several documents in the document list under the tab. You select them by ticking the check box to the left of each document. When you have selected the desired documents, click on the "Show info about the document" icon to display the document's metadata card.

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#### Version management

If there is an existing document with the same file name under the tab, a new version will be created automatically. All metadata from the previous document will be inherited automatically, except for the version field.



If you click on "Version/revision" under the "Document list" tab, all previous versions/revisions of the document will be displayed.

#### Drag and drop

You can also add files to the binder by dragging the files and dropping them under a tab. The metadata can be filled in the same way as in case of uploading.



#### Add files from another source

You can also add documents to iBinder from other sources. This is done by clicking on the upload icon of the globe and the envelope.



#### Clipboard

The clipboard function can be used to copy one or more files to another tab with saved metadata. This can be done within the same binder or between different binders.

To insert a document into the clipboard, look for the tab where the document is located. Put a checkmark in the box in front of the document then click the green plus button.



To upload a document in a tab from the clipboard, click the upload button with the globe. The clipboard will probably be in default mode, if not click on the button to the left.

Then select the document(s) you want to insert by ticking the box in front of them and click on the the Save button.



#### Mail

It is possible to mail directly to files@ibinder.com with attached documents. These documents can then be submitted by clicking the upload button with the globe and clicking on the envelope. Put a checkmark in the box in front of the attached files that you want to post and click the Save button.

Please note that in order to send attached documents via mail, it is required that the e-mail you send is exactly the same e-mail that you have as an account on iBinder.



#### Dropbox

If you have documents in Dropbox, you can insert them directly into iBinder via our link. To enable the connection you must enter your Dropbox account information in your Personal binder. Click the Settings tab and check the Dropbox box. Once done, you will be wrapped up in a page where you can enter your Dropbox login credentials. Fill in your information according to the instructions, then you are ready to start uploading documents to iBinder via Dropbox.

Go to the tab where you want to upload your actions, click on the upload button with the globe and click on the Dropbox icon (blue box). Put a checkmark in the box in front of the files you want to upload and click the Save button.

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### **Downloading documents**

#### Download



On the current tab, select any document(s) to be fetched/downloaded to your local computer. You select documents by ticking the check box to the left of each document.

			Kraft			
✓ E62-11.dwg	<u>A</u>	BH	Plan 1 Del 1	1:50	2011-10-27	2011-10-28
✓ E63-11.dwg		BH	Plan 1 Del 1	1:50	2005-04-12	
✓ E62-12.dwg	<u>A</u>	BH	Plan 1 Del 2	1:50	2011-10-27	2011-10-28
✓ E63-12.dwg		ВН	Plan 1 Del 2	1:50	2005-04-12	

The "Download documents" icon lights up. When the icon is activated, the document(s) will be downloaded. If you have selected several documents, these will be packed into a zip file and downloaded once they have been packed. Depending on the number or size of the documents, this activity may take a while.

The documents will be saved in the web browser's default catalogue for downloaded files or in a location of your choice, depending on your browser.

### Communicating in the project

Communication between participants in a project takes place under the "Messaging" tab. You need to select this tab under "Choose tabs for this binder" if you want to reach the following functions. Any messages are also sent to the selected participant's e-mail addresses. Accordingly, participants do not need to log into the project binder to check for new messages.

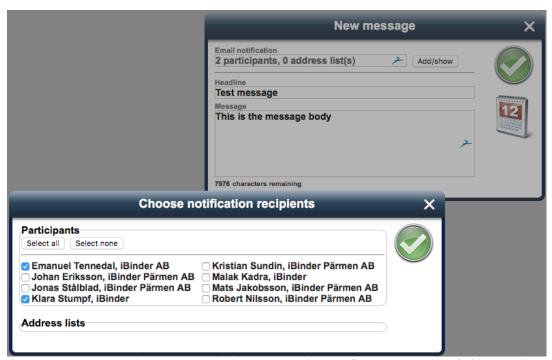
#### Message board



The Message board is used to announce information to the participants. It may concern a notice of newly uploaded documents or an invitation to an upcoming project meeting.

A new message is created by clicking on the "Compose new message" icon. Add a subject heading and message text. Under "E-mail notifications", choose who should be notified by clicking on the button "Add/view" You can either add all participants, selected participants or use a distribution list.

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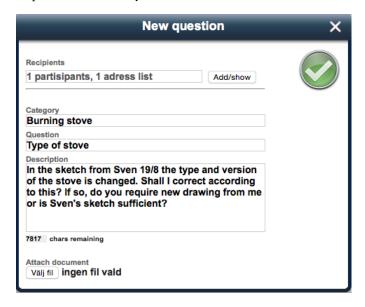
All participants can read messages on the Message board, even if they were not notified by e-mail. There is also a history function, which makes it possible to see who has opened a message.

#### 0&A



There is a Q&A function if you wish to document a discussion. This function is similar to the Message board but makes it possible for recipients to respond to your message. Questions and answers are only shown to those who created the question and selected recipients. This applies to administrators, as well.

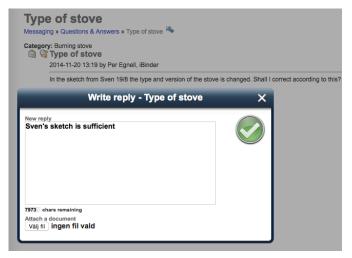
Create a new question by clicking on the "New question" icon. Chose the recipients who should receive the question; all recipients will be notified by e-mail. State the category, Question and Description and attach any relevant documents.



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Responses are entered directly in iBinder.com or directly in the browser window that opens when you click on the e-mail notification.





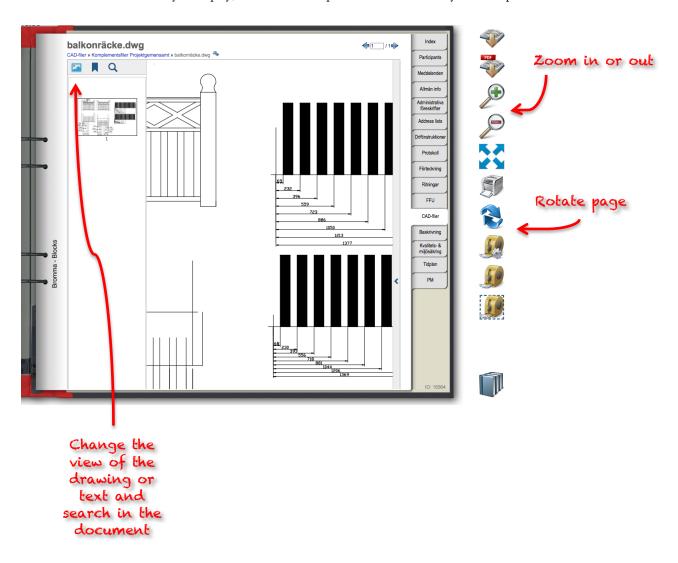
When the matter is completed, the person who created the question can delete it. It will then appear greyed out in the list of questions. Next to the questions and answers, symbols will be displayed that show if you have opened the post, history that shows if the other people participating in the question have opened the posts and, if so, when they did it.



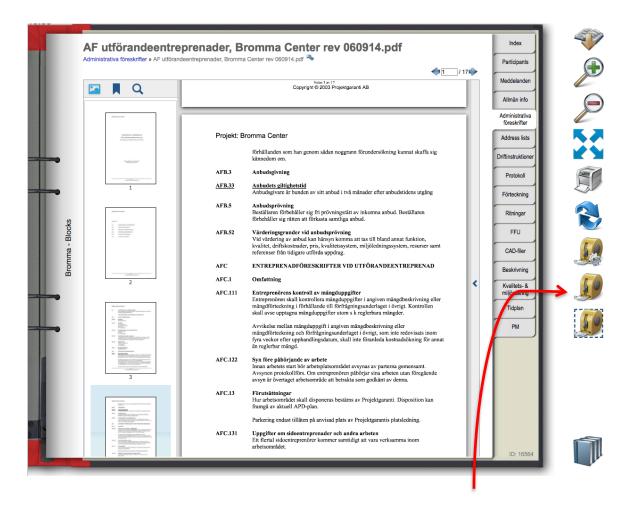
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### Viewing a document

If you click on a document, iBinder.com will open the built-in viewer (or download the document on your local disc, depending on the settings in your personal binder). The viewer lets you display, zoom in on and print the document on your local printer.



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Measure distance or size in a drawing

You can download the document, zoom in and out, show the document in full screen, print it and rotate it.

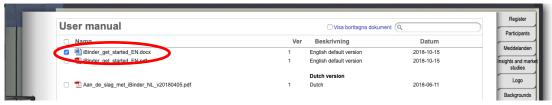
The tape serves to measure distance or size in the document: Click on the first tape to set the scale on the drawing. Then you will be able to apply this and measure anything else in the same document with the second tape. The third one serves to measure surfaces. Click on it and scroll over the document. Click on one of the corners of a surface that you wish to measure and adjust the size of the quadrant.

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### Editing a document online

iBinder is integrated with Microsoft Office 365, therefor it is possible to edit Word, Excel and PowerPoint documents directly in iBinder. You need to have an Office 365 license to be able to use this function.

The online editing function is available in most tab types, where Office documents are commonly used. It is not accessible in Drawings, Contracts and Inspections tabs. When you click on the checkbox of a file, the corresponding Office Word, Excel or Power Point icon appears among other icons on the right.





#### Start to edit documents online

It is not possible to create a new Office Online document from iBinder. To start online editing, please upload an Office file from your computer, then you can continue your work by editing the document online.

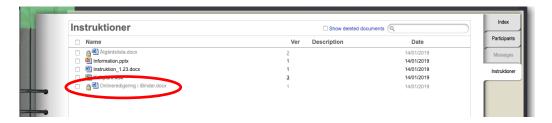
When you click on the Word, Excel or Power Point icon, a pop-up appears where you can write a message for other participants of your binder. This message and your name will be displayed for those who want to open and read the same file while you are editing it. You can of course choose to leave the message field blank.



Please note that a document can only be edited by one Participant at a time. It is locked for all other Participants who can only view the document while you are editing it.

#### Editing online

When a document is being edited by someone, a small padlock appears next to the document.

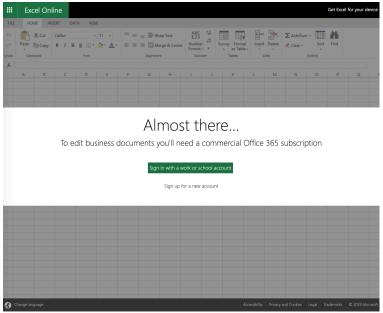


If you are editing a document, it is only you and the Binder Administrator who can unlock the document. The Binder Administrator can either

check in the document in its current state (that may contain changes that you have made since you started editing) or they can go back to the version that you started editing by deleting the working copy.

When you have entered you message and have clicked on the green button, your document opens. If you are using this function for the first time, the following message will appear:

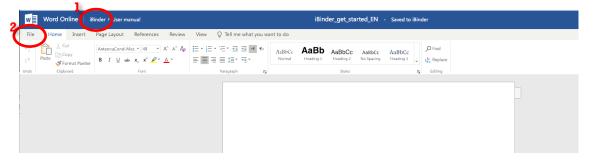
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If you have an Office 365 account, then you will have to log in to your account. Next time you will not be asked again to do this so (only in case your password changes). If you don't have an Office 365 account, choose "Sign up for a new account" and you will be given the opportunity to create a new account.

When you have opened the document, you can edit it the same way as you used to. Changes are saved automatically while you are working. When you have finished, you will have two options:

- 1. Click on "iBinder" on the top.
- 2. Select "File" in the menu of Word Online menu and choose "Exit".



#### Finishing to edit the document

A pop-up window appears, and you can choose if you want to create a new version of the document (and publish it for all other Participants) or want to continue editing later. In the latter case, the padlock will keep on showing that the document is under editing. You can open it the same way as you did when you started editing it the first time.

When you are finished editing the document, choose "Upload your edited document as a new version". A new



window will appear where you can add metadata to your file the same way as when you upload any document to iBinder.

If you have chosen "Continue editing", but want to finalise the document, then do as follows: Click on the checkbox and Select "Check in draft" icon on the right. It will also open the metadata pop-up.

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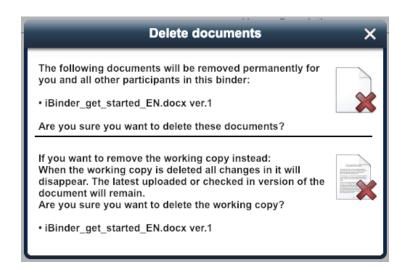


#### Deleting a working copy

If you don't want to publish your changes, then you can delete the working copy only (thus the unpublished changes) by clicking on the "Delete selected documents" button.

A dialogue will come up where you can choose if you want to remove the working copy only or the whole document from the binder:





A deleted working copy disappears both from iBinder and from Office Online and is not possible to reset it.

#### Extended rights of Binder Administrators

As a binder administrator, you have the authority to both check in and delete work copies created by Participants in your binders. It works the same way as if you work with your own working copies. If you see that a document is locked by a user, you should first contact the person in question to find out if the working copy should be published or not. A published work copy is saved as a new version of the document.

#### Non-supported file formats - Macros and ActiveX controls



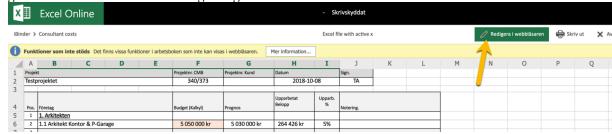
Excel online doesn't support files which are using macros and those using ActiveX controls. For iBinder users it means that files with .xlsm extentions will not have access to Excel online at all.

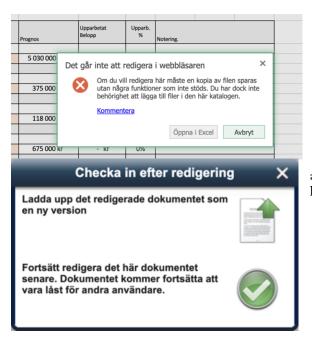
If the file contains ActiveX controls, then Excel online will open up in the usual way where it will look like it was possible to save a copy. This is not possible though and if you try, the document will open with a warning message.

If you click on "Edit in the browser", then you will see the following message: "You can't edit in the browser". Choose "Cancel" in this view and go back to

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iBinder as usual, where you can choose to upload the document or to continue editing. If you choose "Continue editing", then the working copy will be deleted - which should not cause any problems, given the fact that there was nothing changed in the document.





#### What is ActiveX?

The ActiveX is a technology in Internet Explorer that enables the execution of webbased program codes.

#### What are the macros?

Macros automate common and repetitive tasks in Excel. A macro is an action or a set of actions that you can run as many times as you want. When you create a macro, you are recording your mouse clicks and keystrokes.

### **Selection binder**

In iBinder.com, you can create a selection binder based on an existing project binder. A selection binder represents a selection of documents from the project binder. The selection of documents to be displayed in the selection binder is based on the marking of the documents on their metadata cards. You can add markings to documents at a later stage. Please see the section on metadata.



#### Creating a selection binder

You create a selection binder by ticking the check box on the back of the project binder and clicking on the "Make new selection" icon.

A dialogue box will appear, stating the selection criteria. This selection will be selectable in all existing documents in the project binder as well as in documents added later.

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The selection binder is then created by clicking on the green button.

A narrow binder will then be created on the bookshelf, with a tab system that corresponds to the marked documents in the project binder. If additional documents in the project binder are marked, these will automatically appear in the selection binder.

The selection binder has its own list of participants, which means that you can invite participants who will only see the selection binder and the documents in it.

A selection binder can also be copied to a new or existing binder.

### Ordering physical distribution



You can use the distribution pad that is displayed when you open your bookshelf to order physical documents for distribution via your preferred copy shop around the country. The distribution pad consists of three pages. You can navigate between the pages by clicking on the page number or the arrows. You can either select a document from your project or from your local hard drive.



#### Selecting a document from a project

If you want to send documents from a document binder for physical distribution, mark them by ticking the check box to the left of each file. When you have marked the desired documents, click on the "Order printing of the marked documents" icon.

A dialogue box will appear that confirms that the documents have been added, and you can click on the "Distribution pad" icon to go there directly. If you wish to order additional document, close the dialogue box and repeat the procedure until the desired documents have been added to the distribution pad.

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#### Choosing a document from your own computer



On the first page in the distribution pad, you upload the files that should be included in the distribution. By clicking on the "Upload files" icon, a dialogue box will open, displaying your local computer. Select one or several files to be added to your order.



#### Execution

For each file, state what action should be executed and the desired format. If the selected file requires special settings, use "Other information" to add the relevant settings. By ticking one or several files, you can delete or copy the current information to the selected documents.



#### **Recipients**

On page two, enter the recipients of the physical information.

You can either search for the recipients in the system or add them manually. You can also use saved distribution lists created in your personal binder or in a project binder.



You can also add a distribution list in the form of a file or a document.



When the distribution list is finalised, you can save it for future use. State a name and click on "Save distribution list".



#### Invoicing details and type of production

On the final page, provide project information and invoicing details. You can search for this in the register or add yourself or someone else as the payer. Just like the distribution list, this information can be saved to your personal binder for future use.



Finish by adding the production city, the deadline and the mode of delivery. Tick the box below "This job will be produced by" for a list of available production sites.

When you have entered all information, all you have to do is place the order.

#### Order history

When your order has been placed, you will receive order confirmation in your personal binder, under the "Requisitions" tab. This tab shows all previous physical orders.

### Support

All iBinder.com users have free access to our support. During office hours, you can reach us on +46 19 27 00 00. You can also reach us by e-mail to support@ibinder.com.

#### Start-up meetings

To make it easier for all participants in a binder, iBinder.com offers on-site introductions free of charge. We call them start-up meetings. After a start-up meeting, everyone should feel comfortable using the basic functionality: search – view – upload – download – send messages. A start-up meeting usually takes around 30–60 minutes, and these meetings are usually held in conjunction with a design or construction meeting. Call us if you want to book a free start-up meeting.

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