File Management Overview

ProjectTeam contains a file management system to assist the user in efficiently managing project files. Users can quickly upload, download and view files in this system. Files can be quickly uploaded to any form type by using the drag and drop method on the files pane. The User can also create their own folder structure to effectively manage project files. Below are instructions for both accessing form type files and project files.

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Open *Files Shared With Me*
Project Files is where the User will upload the folder structure of their choice to store project related files.

1. Open the project.
2. After navigating into a project, you'll see the left sidebar in any page shows icons for the major areas of functionality of ProjectTeam. Click on **Files**.
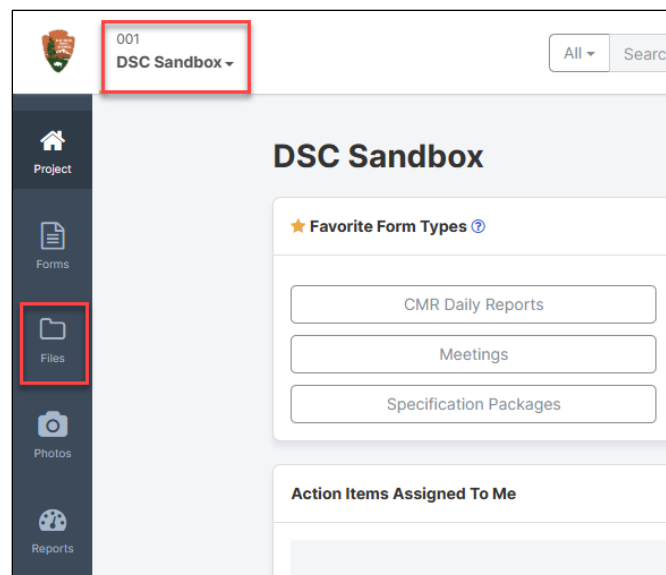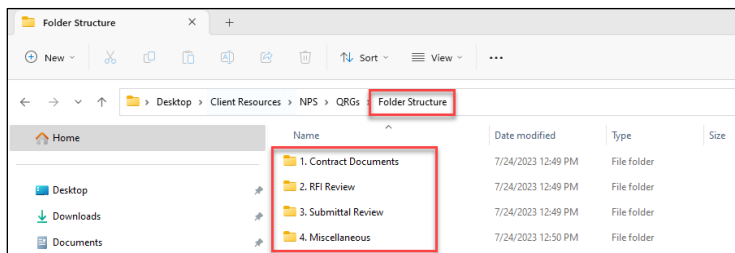
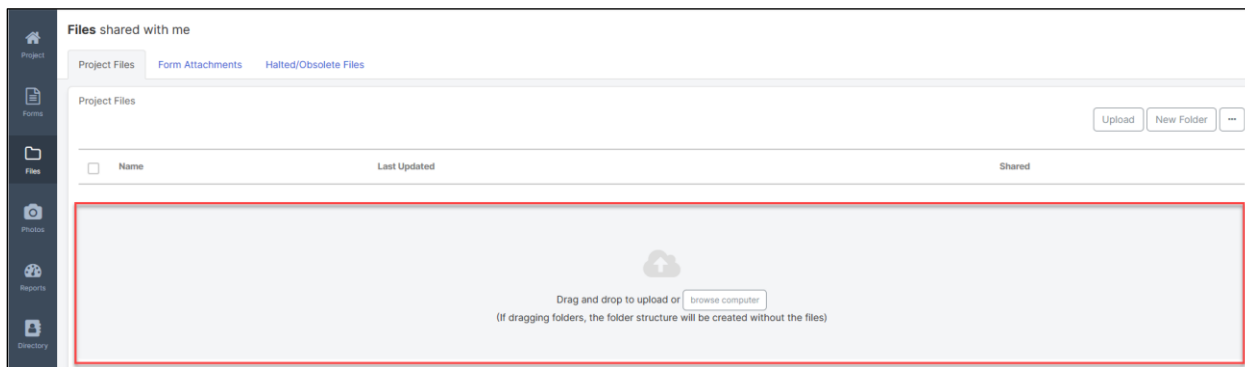3. The *Files shared with me* pane opens to the **Project Files** tab.


Upload a Folder Structure

4. Open the desired folder structure from File Explorer on your computer.

5. Select the desired folders and then drag and drop the structure into the bottom panel of the *Files shared with me* pane.
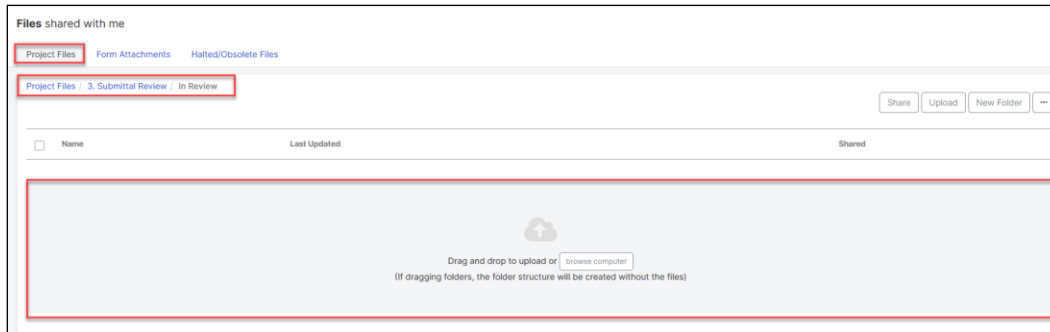

6. The entire folder structure uploads. No files contained in the folder structure will be uploaded, only parent folders and any folders within them.
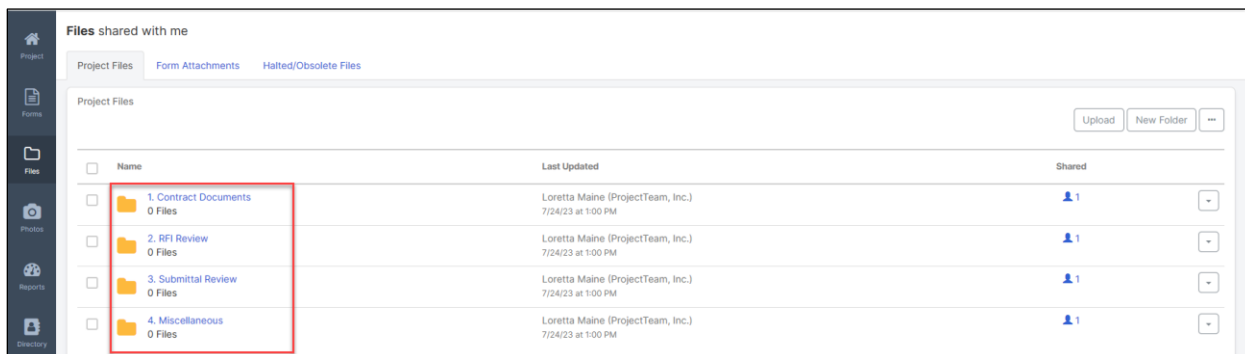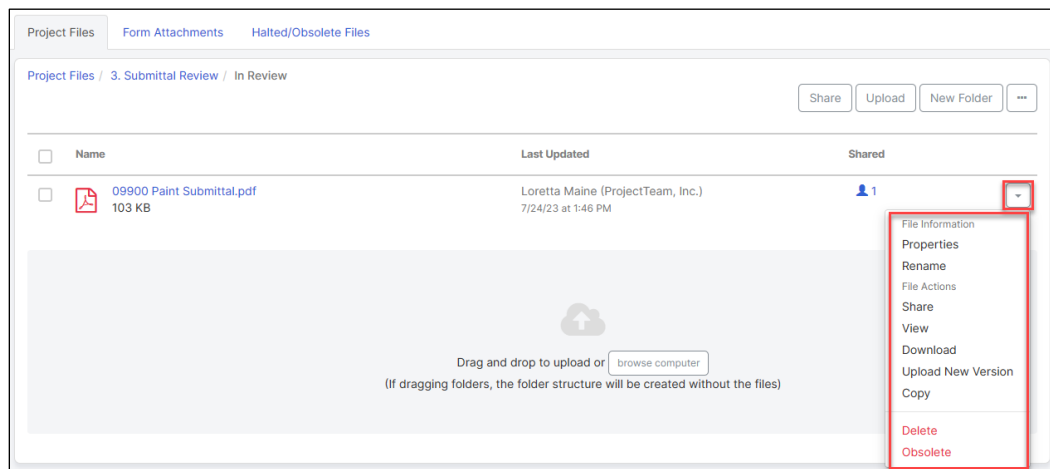
Uploading Files

7. Open the desired folder, browse to the file location from your computer's File Explorer, then drag and drop the one or more files into the bottom pane.

File Information and Actions

8. Click the dropdown menu to the right of the file name and select the appropriate action.


- **Properties:** Opens the form record associated with the file.
- **Rename:** Users can rename files.
- **Share: Select Share Groups and/or users to share the file with.**
- **View:** Opens a preview of the file.
- **Download:** Saves a copy of the file to the Downloads file on your computer's File Explorer.
- **Upload New Version:**
- **Copy:** Opens your computer's File Explorer and allows you to select the file to replace the current one as the next Version.
- **Delete:** Files that have not been shared with other users can also be **Deleted** using the dropdown menu.
- **Obsolete:** Files that have been shared can only be **Obsoleted** which moves them to the Halted/Obsolete Files tab.

Access Form Attachments

By default a folder is created for all form types. As files are attached to any form the file is stored in the folder created for that form type using the Document Subject as a title for the sub-folder.

1. Open the project.
2. Click on **Files** from the left sidebar in any page.
3. Click on the **Form Attachments** tab.
4. Click the drop down arrow to **Open** the folder or **Download** all files in the folder to a Zip file.
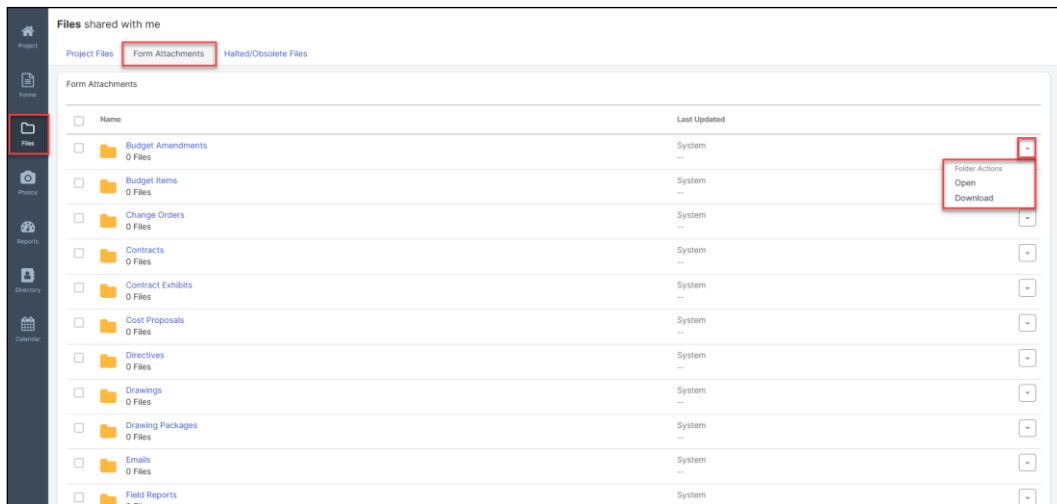
Manage Halted/Obsolete Files

A *Project File* that has been made Obsolete will no longer appear in the *Project Files* tab but can still be accessed from the Halted/Obsolete Files tab. **NOTE:** Files contained on the Form Attachments that have been obsoleted will not be shown on the Halted/Obsolete Files tab.

1. Open the project.
2. Click on **Files** from the left sidebar in any page.
3. Click on the **Halted/Obsolete Files** tab.
4. Click the drop down arrow to **View** or **Download** the file.
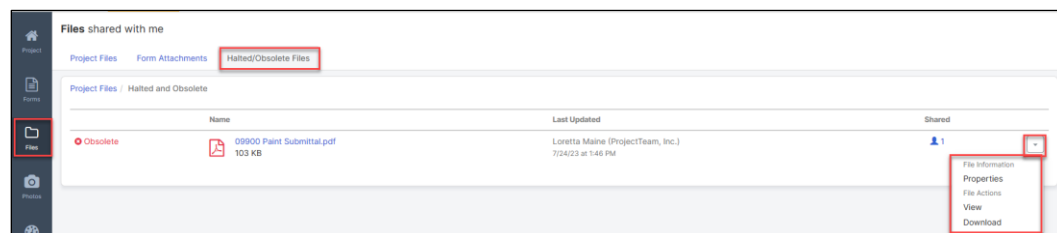
Unobsolete a Project File

When a *Project File* document has been marked as obsolete, it can be moved back to *Project Files* and opened back up for changes by making it Unobsolete.

5. From the drop down menu, select **Properties**.
6. Click the ellipse button … on the top right of the pane and select **Unobsolete**.
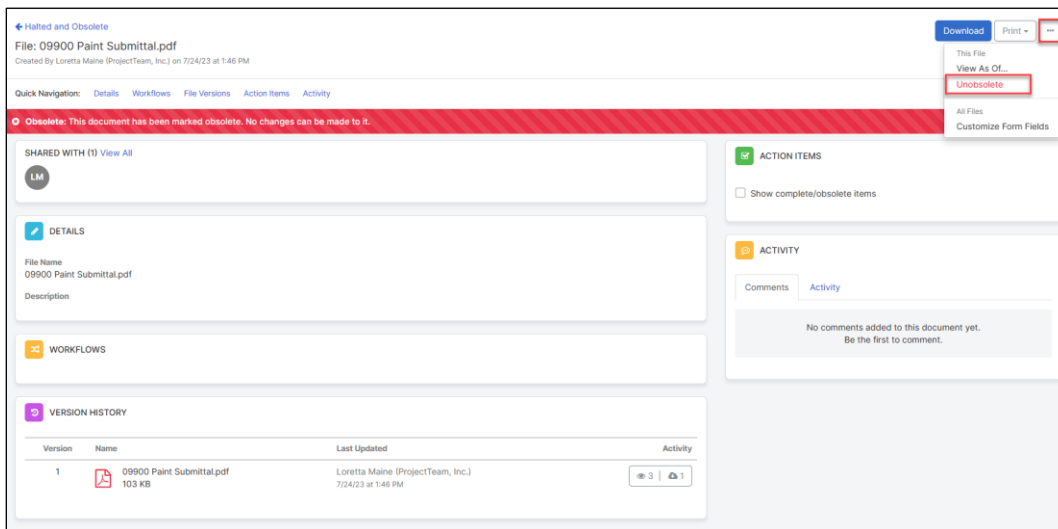
Related Resources

Help Center Links
Files Overview (projectteam.com)
Viewing files and attachments (projectteam.com)
Video: Project Files Overview (projectteam.com)

Quick Reference Guides (QRGs) and Training Videos
Sharing Records
Adding Attachments
Photo Management
Creating RFIs
Creating Submittals
Creating Drawings and Packages
Creating Meeting Minutes
Creating Daily Reports
Creating Punchlists