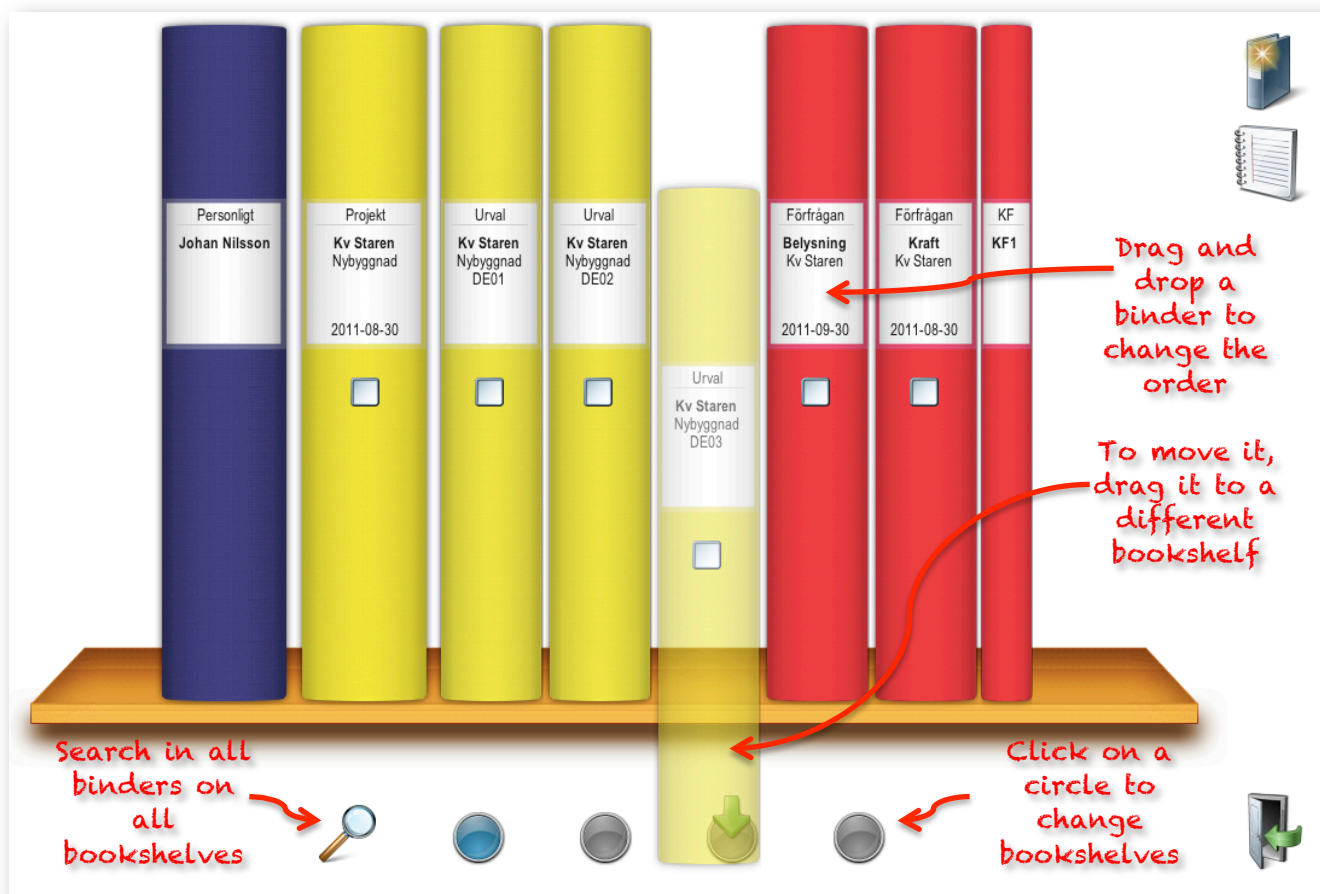


# Get started with *iBinder*



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## Get started

### Web browser



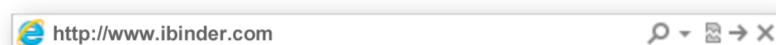
iBinder.com has been adapted to the latest browser technology and has been tested with common web browsers, including Internet Explorer, Mozilla Firefox, Apple Safari and Google Chrome.

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 also can also be used on handheld devices, such as smartphones and tablets, including iPhone, iPad and Samsung Galaxy. 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](http://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.

#### Trusted sites

Make sure you add our new domain, [ibinder.com](http://www.ibinder.com), as a trusted site in your browser.

#### Get a free account

An iBinder account is free and you can sign up for it [here](#).

#### Forgot your password?

To recover your password [click here](#)

☐ Remember me

By logging in you accept our [General Agreements](#) and our use of cookies.



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

## Your personal binder

### Personal information

The first thing you see is your personal binder and the “Personal information” tab. Fill in your information. You can return here at any time to make changes, for example if your phone number changes. If you want, you can upload a photo of yourself. This information and your photo will appear in all binders you participate in.

The invoicing information will be used if you order physical drawings via the distribution service or start your own project binder. You can also change your password.

### Settings

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

**File upload method:** This determines which method you will use when uploading files. We recommend “Automatic”.



**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 Construction/Property***

Under the “Services Construction/Property” tab, you can choose which modules should be available when a new binder is started.

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.

### ***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.

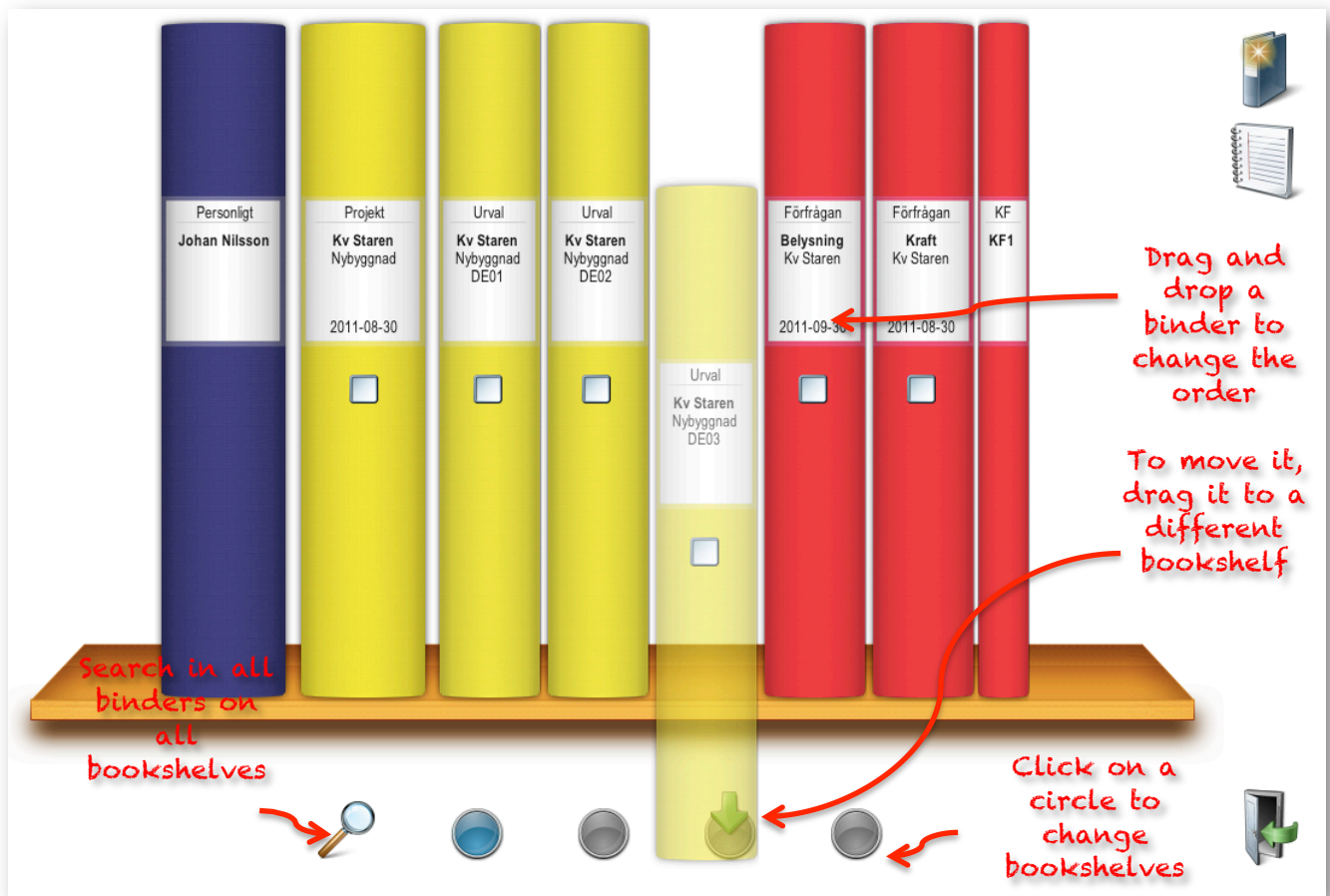


### ***Back to your bookshelf***

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.

## 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 Construction/Property” tab in your personal binder, you can also choose which type of binder to start.

The 'Create new binder' dialog box contains the following fields and options:

- Name**: A text input field.
- Description**: A text input field.
- Date**: A date picker showing '11/20/2014'.
- Project size**: A dropdown menu showing 'Demo (Closes at 24:00)'.
- Binder colour**: A row of color swatches including green, yellow, orange, red, purple, blue, and grey.

A green checkmark icon is visible in the top right corner of the dialog box.

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

**Official designation:** 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.

**Construction value:** The construction value 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 participant 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.



Choose tabs for this binder	
<input checked="" type="checkbox"/> Participants	<input type="checkbox"/> IT Plan
<input type="checkbox"/> Administrative regulations	<input type="checkbox"/> Lists
<input type="checkbox"/> CAD Files	<input checked="" type="checkbox"/> Project baselines
<input type="checkbox"/> Contracts	<input type="checkbox"/> Operating instructions
<input checked="" type="checkbox"/> Descriptions	<input type="checkbox"/> PM
<input type="checkbox"/> Address lists	<input type="checkbox"/> Minutes
<input checked="" type="checkbox"/> Drawings	<input type="checkbox"/> Quality / Environmental management
<input checked="" type="checkbox"/> Economy / Budget	<input type="checkbox"/> Timetable
<input type="checkbox"/> Inspections	<input checked="" type="checkbox"/> Messaging

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", "Memos" and "Drawings", depends on the technology areas assigned to each participant. For further information, please read the section "Adding participants".



### ***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.





### ***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** [X]

**Per Egnell, iBinder**

**The participant's role**

**Project Leader**

**Participant permissions**

☒ **Administrator - the participant has full permissions**

**The participant handles one or more technical areas**

The participant can store documents in his/her technical area under tabs with support for technical area, for example Drawings, Descriptions and Lists.

<input type="checkbox"/> Acoustics	<input type="checkbox"/> Glass facades construction
<input checked="" type="checkbox"/> Architecture	<input type="checkbox"/> Heating and sanitation
<input checked="" type="checkbox"/> Construction	<input type="checkbox"/> Heating, ventilation and sanitation
<input type="checkbox"/> Control and surveillance	<input type="checkbox"/> Landscaping
<input type="checkbox"/> Cooling	<input type="checkbox"/> Plumbing
<input type="checkbox"/> Electricity	<input type="checkbox"/> Project shared
<input type="checkbox"/> Elevator	<input type="checkbox"/> Sprinkler
<input type="checkbox"/> Fire	<input type="checkbox"/> Ventilation

☐ The participant can store documents under shared tabs

☐ **Guest - the participant can only view and download documents**

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.

## ***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.

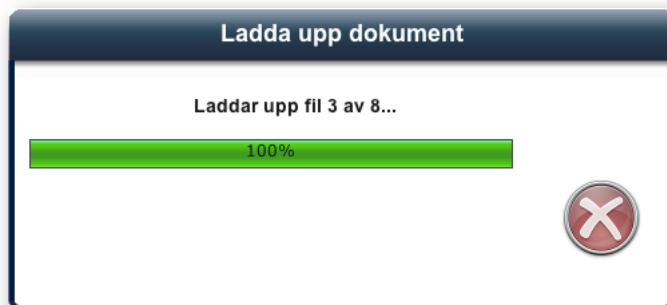


If you have permission to upload documents, the “Upload documents” icon will appear. If you cannot see this icon, then you do not have permission to do so under the tab in question. Permissions depend on the technology areas you have been assigned under the “Participants” tab.

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 “CAD files/drawing definitions”.

**Version:** 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.

**Heading:** If you provide a heading, any documents with the same heading will be grouped under this heading in the tab’s document list.

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

**Scale:** You should add the scale of the document here.

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

**Enter metadata**

Drawing number  
**E62-11**

Revision  
☐ **1**

Status  
☐ Contract drawing (Co)

Category  
☒ **Power**

Description/location code  
☐

Scale  
☒ **1:50**

Date  
☐ **2014-10-20**

Revision date  
☐ **2014-10-25**

Show document in these selection binders  
☐ **This binder has no selections.**

Notes  
☐

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

**Marking:** In this field, you can add a marking to the document. Markings are used to create selections in the project binder. This is explained in more detail in the section on selections.

**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.

BH	Plan 1 Del 2
BH	E62-12.dwg
BH	Märkning:
BH	Filstorlek: 45,79 KB
BH	Uppladdad av: Johan Nilsson
BH	Uppladdad: 2011-10-27 14:44:32
BH	Notering:

There is a check box 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.

## 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.

Kraft							
<input type="checkbox"/>	E62-11.dwg	A	BH	Plan 1 Del 1	1:50	2011-10-27	2011-10-28
<input type="checkbox"/>	E63-11.dwg		BH	Plan 1 Del 1	1:50	2005-04-12	
<input type="checkbox"/>	E62-12.dwg	A	BH	Plan 1 Del 2	1:50	2011-10-27	2011-10-28
<input type="checkbox"/>	E62-12.dwg		BH		1:50	2011-10-27	

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

## 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							
<input checked="" type="checkbox"/>	E62-11.dwg	A	BH	Plan 1 Del 1	1:50	2011-10-27	2011-10-28
<input checked="" type="checkbox"/>	E63-11.dwg		BH	Plan 1 Del 1	1:50	2005-04-12	
<input checked="" type="checkbox"/>	E62-12.dwg	A	BH	Plan 1 Del 2	1:50	2011-10-27	2011-10-28
<input checked="" type="checkbox"/>	E63-12.dwg		BH	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

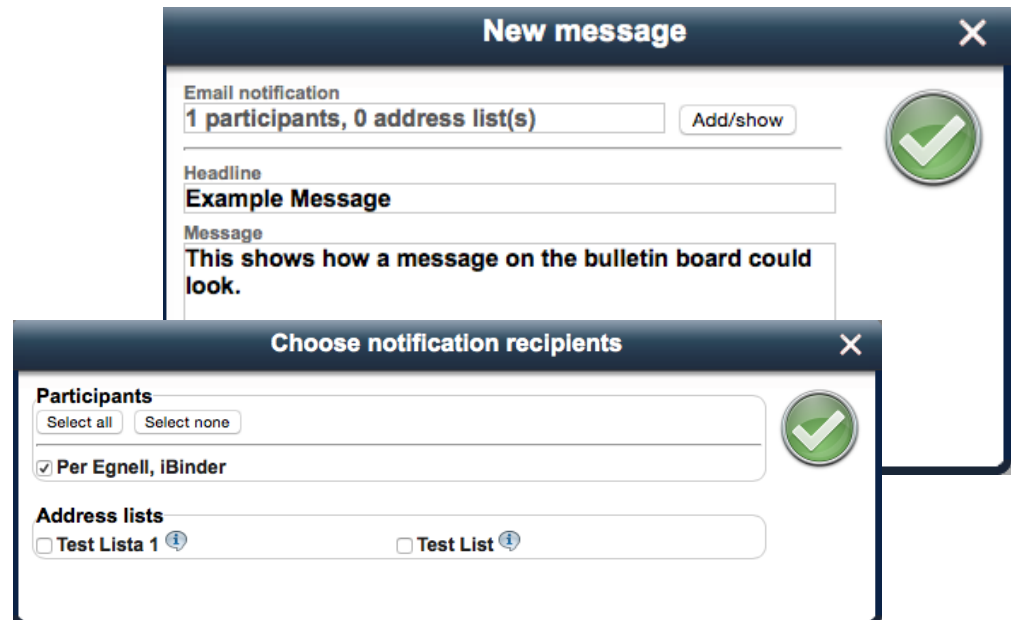
Communication between participants in a project takes place under the “Messaging” tab. Any messages are also sent to the selected participant’s e-mail addresses. Accordingly, participants do not need to log into the project binder to check for new messages.

### Notice board



The Noticeboard 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.



The image shows two overlapping dialog boxes. The top box, titled 'New message', has a close button (X) in the top right. It contains an 'Email notification' section with a text field showing '1 participants, 0 address list(s)' and an 'Add/show' button. Below this is a 'Headline' field with the text 'Example Message' and a 'Message' field with the text 'This shows how a message on the bulletin board could look.' A green checkmark icon is in the top right corner. The bottom box, titled 'Choose notification recipients', also has a close button (X). It has a 'Participants' section with 'Select all' and 'Select none' buttons, and a list with 'Per Egnell, iBinder' selected. Below is an 'Address lists' section with 'Test Lista 1' and 'Test List' (both with info icons) and an unchecked checkbox. A green checkmark icon is in the top right corner.

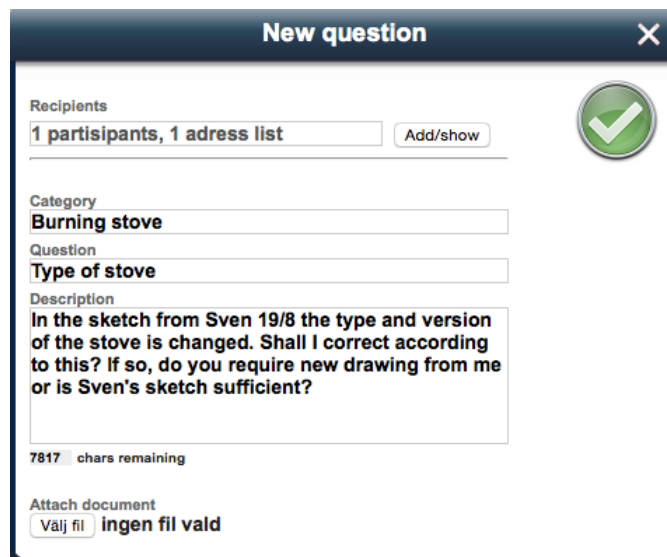
All participants can read messages on the Noticeboard, even if they were not notified by e-mail. There is also a history function, which makes it possible to see who has opened a message.

### Q&A



There is a Q&A function if you wish to document a discussion. This function is similar to the Noticeboard 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.



The image shows a 'New question' dialog box with a close button (X) in the top right. It contains a 'Recipients' section with a text field showing '1 partisipants, 1 adress list' and an 'Add/show' button. Below this is a 'Category' field with the text 'Burning stove', a 'Question' field with the text 'Type of stove', and a 'Description' field with the text 'In the sketch from Sven 19/8 the type and version of the stove is changed. Shall I correct according to this? If so, do you require new drawing from me or is Sven's sketch sufficient?'. A '7817 chars remaining' indicator is below the description field. At the bottom is an 'Attach document' section with a 'Välj fil' button and the text 'Ingen fil vald'. A green checkmark icon is in the top right corner.



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

**Type of stove**  
Messaging » Questions & Answers » Type of stove

Category: Burning stove  
**Type of stove**  
2014-11-20 13:19 by Per Egnell, iBinder

In the sketch from Sven 19/8 the type and version of the stove is changed. Shall I correct according to this?

**Write reply - Type of stove** X

New reply  
**Sven's sketch is sufficient**

7973 chars remaining  
Attach a document  
Valj fil Ingen fil vald



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.

Category: Burning stove  
**Type of stove**  
2014-11-20 13:19 by Per Egnell, iBinder

In the sketch from Sven 19/8 the type and version of the stove is changed. Shall I correct according to this? If so, do you require new drawing from me or is Sven's sketch sufficient?

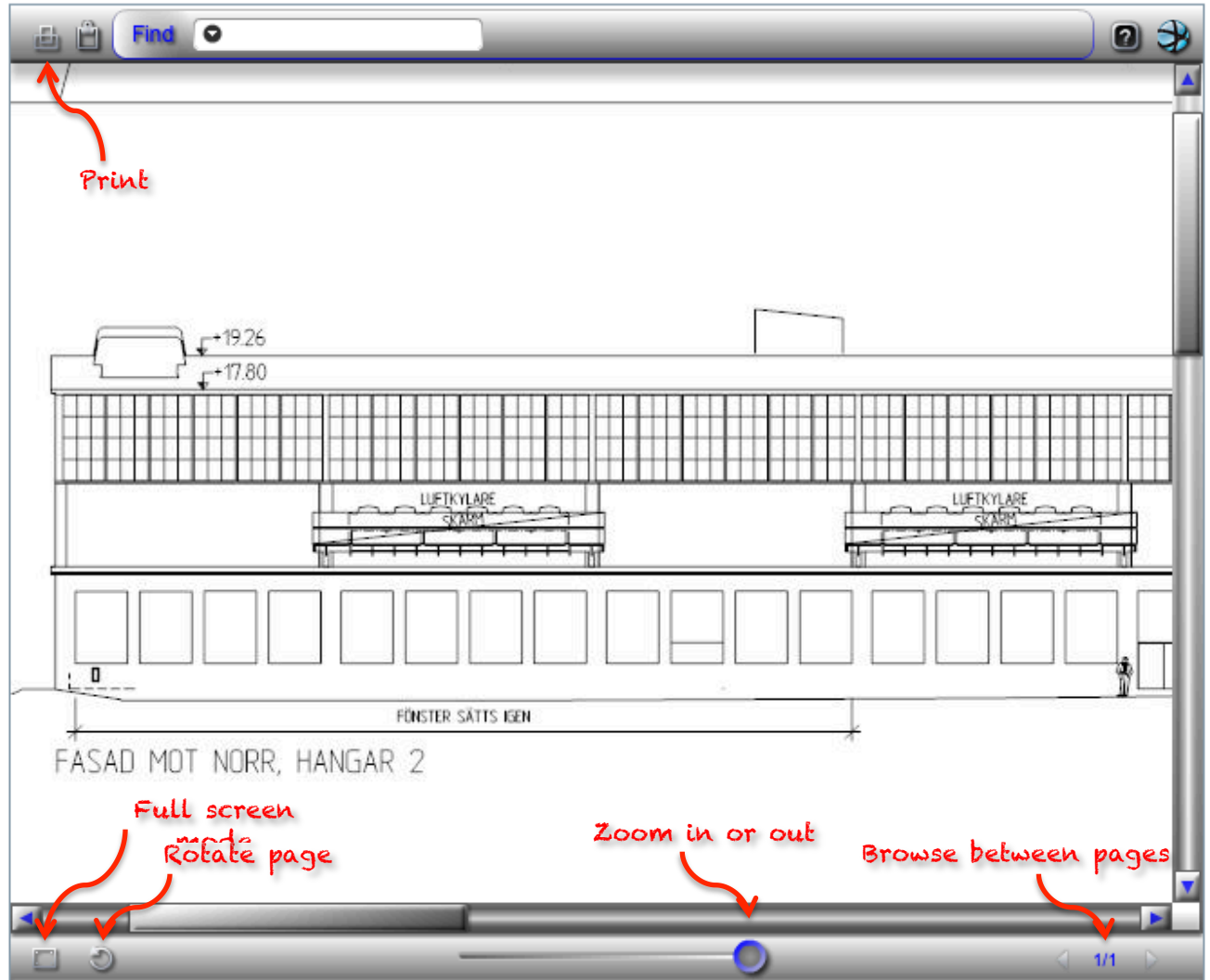
**2014-11-20 13:25, Per Egnell, iBinder**  
Sven's sketch is sufficient

## Viewing a document

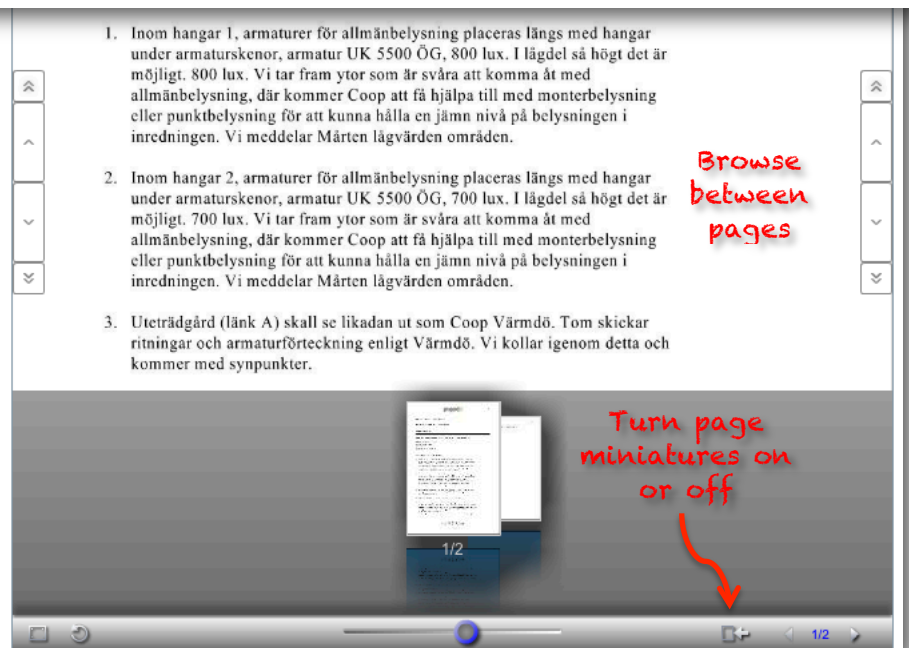
If you click on a document, iBinder.com will open the built-in viewer. The viewer lets you display, zoom in on and print the document on your local printer.

### A03-59-643.pdf

Ritningar » Arkitektur » A03-59-643.pdf



This is what the viewer looks like when you view text documents



## ***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.

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.





### ***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](mailto: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.