



Ascent Homes



**Advance
Northumberland**

Viewpoint

Consultant, Sub-Contractor and
Supplier User Guide

<https://n3g.4projects.com>

Contents

- 1. Invitations**
 - a. Accept a new Invitation
 - b. Accept an Invitation as an existing user
- 2. Personal Profile Settings**
- 3. Tender Notifications**
- 4. Uploading New Items**
 - a. Add a New Item
 - b. Enter Information about the Item
- 5. Uploading Multiple Items**
 - a. Upload Multiple New Items
 - b. Upload New Items with Secondary Files
 - c. Upload Multiple Revised Items
- 6. Downloading Items**
- 7. Revising an Item**
 - a. Revise
 - b. Live Revise
 - c. Revising Multiple Items
- 8. Edit**
 - a. Edit an Item
 - b. Edit Multiple Items
- 9. Moving Items**
- 10. Searching for Items**
- 11. Task Container – Request for Information**
 - a. Creating a Task - Issuing an RFI
 - b. Redirecting/Forwarding an RFI to another user
 - c. Responding to an RFI.
- 12. Discussion Container**
 - a. Create a Discussion
 - b. Respond to a Discussion
 - c. Respond to a Discussion using an Email
 - d. Close the Discussion
- 13. Notification Transmittal**
- 14. Workflows**
- 15. Create a Drawing Register/Issue Sheet**
- 16. Navigation**

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1. Invitations

a. Accept a new Invitation

- Before we you can get started, the Viewpoint administrator must email you an invitation to join.
- Once you receive the invitation, click on the link in the email to accept the invitation and create a user account.
- When you accept the invitation, a window will open and guide you through creating a new user account.
- During this process you will select a username and password, and enter basic information, for example your name and job title.

You can always change this information after you create you user account.

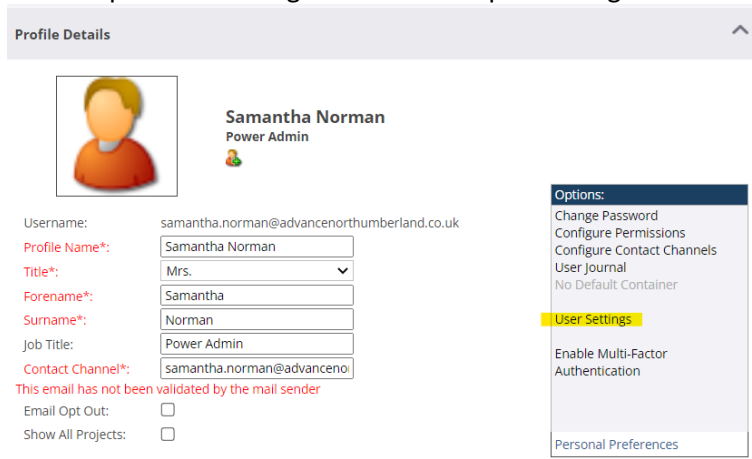
- Most if the system will work with on any browser, but we recommend using Internet Explorer 9.
- We also recommend that you allow Pop ups from Viewpoint and add the system as a trusted site.
- All these options are set up using the Internet Options dialog in Internet Explorer in **Tools>Internet Options**.
- Log in with your Username and Password and start collaborating!

b. Accept an Invitation as an existing user

- If you already have a Viewpoint account, you may receive additional invitations that will give you access to additional Sites, Projects, or Enterprises. By accepting the additional invitations, you are adding permissions to your account that allow you to access other Sites, Projects, and Enterprises.
- If you've already created an account and you've been invited to have access to another Site, Project, or Enterprise, you'll see a Pending Invitation Notification when you log in. If you don't want to review your invitation now, you can review it later by selecting **Manage your Profiles and Pending Invitations** after logging in.
- Click **Show and Accept your Invitations** a manage your profiles window will appear.
- Select **Accept**.
- Select a **Language**.
- Select the profile you want to apply these new permissions to.
- Click **Next**. Verify the details in the invitation acceptance window are correct.
- Click **Finish**.

2. Personal Profile Settings

- Select personal settings from the Viewpoint navigation tree as per below.



The screenshot shows the 'Profile Details' page for a user named Samantha Norman, who is a Power Admin. The page includes a profile picture placeholder, the user's name and title, and a list of personal details such as Username, Profile Name, Title, Forename, Surname, Job Title, and Contact Channel. A settings menu is open on the right, listing options like Change Password, Configure Permissions, and User Settings, with 'User Settings' highlighted in yellow. Below the settings menu, there are checkboxes for 'Email Opt Out' and 'Show All Projects'.

- Ensure your personal settings are up to date and current.
- Select user settings in options (highlighted above).

Consultant, Sub-Contractor and Supplier User Guide

User Setting Fields					
Delete	Edit	User Setting Field Name	Full Path	Configure	Activity
		CONTAINER_RECORD_LENGTH		Configure	
		DEFAULT_MARKUP_COLOUR		Configure	
		SEARCH_SAVE_COLUMNS		Configure	
		SEARCH_VISIBLE_COLUMNS		Configure	
		PROJECTINBOX_PERSISTED_VIEW		Configure	
		EMAIL_REPORT_PROFILE		Configure	
		ALLOW_SECRET_KEY		Configure	
		USER_CULTURE_STRING		Configure	
		USER_CULTURE_FORMAT_STRING		Configure	
		USER_TIMEZONE		Configure	
		SAVED_REPORT_RUN_EMAIL		Configure	
		BRAVA_DEFAULT		Configure	
		BRAVA_PROXY		Configure	
		USER_DOWNLOAD_FORMAT		Configure	

- Selecting **Configure** will allow you to change certain settings.
- CONTAINER_RECORD_LENGTH allows you to choose how many results your searches return per page. The default is 20. You can choose anything up to 500 per page.
- EMAIL_REPORT_PROFILE allows you to choose between receiving daily or weekly summary emails of items for your attention.
- USER_DOWNLOAD_FORMAT allows you to choose the format in which downloaded items appear (Name, Revision etc.)
- Select 'apply' and then **OK** to save any changes.

3. Tender Notifications

- An invitation to tender will be sent through email. A link on this email will redirect the recipient into a secure Public Files container on Viewpoint.
- You will be able to download the tender information individually or as a zip file.
- At the end of the tender period, this secure container will become in accessible.

4. Uploading New Items

Upload an item into a container so that you can share it and collaborate on it with other users. Items are automatically registered when you upload them using this method, so they are visible to other users.

a. Add a New Item in one of the following ways

- Right-click on the container that you want to upload the item to and select **New Document**. Click **Add Primary File** and browse to the item you want to add.
- From the container's **Items** page, go to **Upload File(s) - New Item**. Click **Add Primary File** and browse to the item you want to add.

b. Enter information about the Item. The fields marked with an * are required

- Add a **Primary file** i.e., PDF or word document.
- Add **Secondary file** i.e., DWG or JPG's.
- Enter the **Name** of the item. E.g., drawing number AA (01)02.
- Enter a **Description** of the document. E.g., First Floor Plans.
- Enter the **Owner**, who is the person who created the file.
- Enter **Revision Reference**, E.g., Revision A.

Consultant, Sub-Contractor and Supplier User Guide

- Enter a **Revision Status**. For drawings, it will be either **For Approval** (preliminary drawings), **For Construction** or **As Built**. For all other types of documents, not construction information, the status will be **For Information**.
- Enter the **Revision Author**, this is the person who uploaded the document.
- **Linking Documents**. You can link the item you are uploading to another container that you have permissions for.

Deleting the file in the original container will also delete the file in the linked container.

- **Recipients**. Select the users that should be notified that the item has been uploaded. Click the plus (+) sign to select recipients or select the magnifying glass to select multiple users from a drop-down list. Once this is done you must also click the **Email Recipients** bot to ensure they receive the notification.
- **Private**. Select this if only you and the **Recipients** selected should be able to see the item.
- **Files Publicly Available**. Select this if the item should be available as a URL that can be provided to users who do not have access to Viewpoint.
- **Expires**. If you selected **Files Publicly Available**, select this if you want the URL to expire on a specified date and time.

5. Uploading Multiple Items

It is easy for all team members to upload new and/ or revised documents into the containers. Whether a single or multiple documents, new or revised, when you drag and drop your files into our browser the system will differentiate between new and existing files and present you with a registration grid where you can validate and tailor your information for upload.

It is essential that all information that is uploaded is given the correct status so that the correct approval workflow is activated, and the right people notified (see workflow section for explanation). Available status options are-

Documentation – For Information
Preliminary – For Review
Construction – For Construction
Completion Records – As Built

a. Upload multiple New Items

- Navigate to the containers.
- Click **Upload Files**.
- Click **Select Files**, **Select Folder** or drag and drop files into the box. A progress bar displays at the bottom of the screen.
- Once all the files have finished loading, click the **Upload** button. The items appear in the upper section of the grid that loads.
- Complete any necessary data. If the system highlights any naming convention errors, make the necessary corrections.
- Click **Upload** to finish the process.

All drawings must be registered before uploading. Any unregistered Items can be deleted by Administration.

b. Upload New Items with Secondary Files

- The system automatically merges secondary files with the same name as the primary file.
- If any secondary files have different names than their primary files, merge them together using the multi-arrow icon to drag the file to the item you want to merge it to. By default, the system makes PDF files primary. Primary files are denoted with a star and secondary files with a red cross.

Consultant, Sub-Contractor and Supplier User Guide

- If you want to remove the secondary file from the row, click the red cross. If you want to swap the primary file, select the check box to the left.
- Click **Upload** to finish the process.

c. Upload Multiple Revised Items (no change to file names)















- Navigate to the containers.
- Click **Upload Files**.
- Click **Select Files**, **Select Folder**, or drag and drop files into the box.
- A progress bar displays at the bottom of the screen.
- Once all the files have finished loading, click the **Upload** button.
- The items appear in the lower section of the grid that loads.
- Complete any necessary data.
- When uploading revisions, it is common to only revise the status or reference.
- Click **Upload** to finish the process.


Upload Multiple Revised Items (some file names changed)

- When uploading use the quad arrow icon to drag the file(s) from the upper to the lower section to convert the selected files to revisions of existing files.
- A new window appears, presenting a drop-down list of the items available to revise. Select the correct item.
- Complete any necessary data.
- Click **Upload** to finish the process.

6. Downloading Items

- Select the document you wish to download by clicking in the column next to the item under the green tick.

					Name	Description
					Architect Drawing Plot	design
					Architect Drawing Plot	design

- To select multiple drawings, hold down the CTRL button and select the items.
- Click on the  button once your files have been selected.
- A dialogue box will pop up asking if you want to save them or open them up as clickable files in windows explorer.
- You can also click on the items name and click **Save As** when prompted to download and items primary file.

This will also download any secondary files associated with the items being downloaded.

7. Revising an Item

Drawings cannot be revised if they are still in the workflow (Blue or Pink)

a. Revise

To add a revised item to an existing uploaded item.

- The quickest way to revise an item is to right click over the **Mouse Icon** and from the drop-down menu select **Revise**.
- Enter the new revision information.
- To upload your file in the **Upload New File** section, click **Select** to navigate to your chosen file. The file will open, and some fields will be pre-populated with the existing items detail.

- Click **Revise** document.

b. Live Revise

To work on/revise a document 'Live' in the system so when it is saved it is automatically shown as the next revision in the container.

- Select the document you wish to download by clicking in the column next to the item under the green tick.
- The quickest way to revise an item is to right click over the **Mouse Icon** and from the drop-down menu select **Live Revise**.
- If you are not using Internet Explorer, there is a **Click to open directly within Office** link that will launch the document in the appropriate application (for example Word, PowerPoint, Excel, etc).
- This opens the file in the program which the document was created in so you can amend the document.
- Once you have finished amending the document **Save** as normal (you should see a circle of arrows within your save button) and when you go back to the container you will see the document with the revision updated (if this is not shown straight away you will need to refresh the page for the update to be processed).

c. Revise Multiple Items

- From a container, select the items that you want to revise. To do this, hold down CTRL and click in the column next to each document.
- Click on the **Revise Items** drop down in the toolbar at the top of the form and click **Revise Item(s)**. The Multiple Revision Upload dialog will display.
- Enter relevant information about each document.
- Click **OK** to create the new revisions.

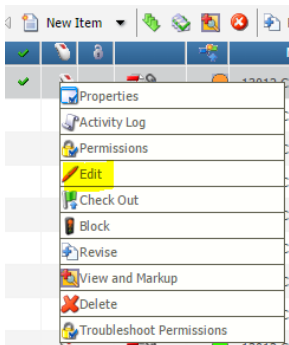
8. Edit

You can edit the information associated with an item to tracking details like revision status, notes, and owner.

a. Edit an Item

If you need to edit the drawing of documents metadata; you will need to follow the following steps:

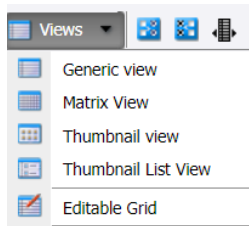
- Click on the mouse icon next to the drawing or document requiring editing.
- Select Edit from the drop-down list.




- Make amendments.
- Select **Save Changes**.

b. Edit Multiple Items

- Open the container that contains the items you want to edit.
- Go to **Views > Editable Grid**.



- Click in the column next to the item that you want to download under the green tick. Hold down CTRL and click, to select multiple items.
- Change information as desired. To apply the same information to multiple items, select the items, enter the information in a row, and then click .
- Press the **Enter** key to save your changes.
- To return to the list of items in the containers, click on the **Views** drop down list and click **Generic View**.

9. Move Items

Move items from one container to another (providing you have the permission – set by your security group)

All statuses, recipients and keywords will be lost when moving items.

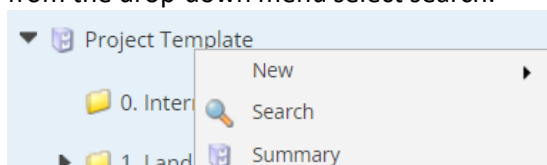
- Select the document you wish to download by clicking in the column next to the item under the green tick. Hold down the shift button or CTRL and click to select multiple items.
- Click on the **Actions** button and select **Move Items** from the drop-down menu.
- From the pop-up dialogue box, select the container you wish to move the item to and press ok. The item will now have moved to the selected container.

*This is **moving** the file; it is not copying the file. To have one file in separate locations use **linked locations** during item upload.*

10. Search

To locate files which cannot be found.

- To search the whole of a projects **folders right click** on the **top-level project container** E.g., Ellington and from the drop-down menu select search.



(You can also search in just one container by right clicking on that container)

- In the search dialogue box type in the name, or a known word, which is within the item name. You can also search using description and narrow it down with other options, which should be self-explanatory.

In the search dialogue box if you are, searching in containers, which contain sub-containers then ensure sub-containers box is ticked.

11. Task Container - Requests for Information

The Viewpoint RFI process is to be used for all requests for information from sub-contractors and suppliers.

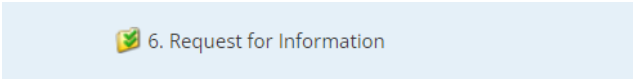
Whilst information may be requested by a sub-contractor or supplier the input of the RFI into Viewpoint is to be completed by the design coordinator responsible for that job. If a site manager has a request direct from himself

or communicated to him onsite by a sub-contractor or supplier, he can also raise the request for information on Viewpoint.

The design coordinator can then close the task when the assignment has been completed and no more work is expected to be done on the task. This changes the status of the task to **Closed Resolved**.

a. Creating a task - Issuing an RFI

- Go to container



- Click on **New Task** button.
- In the name line, enter the name of the latest RFI, i.e., RFI-001, the number being the latest RFI in numerical sequence.
- In the **Description** box, enter a summary of the RFI, E.g., window details or roofing spec.
- Assign a **Priority** – High priority - 2 working days response, Medium - 5 Working days and Low - 10 working days.
- Enter an **Assignee**, this is the only person who can respond directly back to the requestor or forward on the query to another party to provide a response, as stated above the first assignee is always the design coordinator (After the request has been made the assignee of a forwarded RFI can be anyone)
- Type in the request in the **Body Text** box.
- Enter a **Due Date and Time** to align with the **Priority**, which has been set.
- Always leave the **Percentage** box as 0%.
- Enter recipients, these are other people who will be able notified of the RFI and can view the post thread but they cannot comment.
- Leave private box un-ticked so that any user with access to the container can see the RFI's.
- Tick the response required box.
- Leave disable forwarding un-ticked as it is essential the assignee can forward the RFI if necessary.
- **Attach document** from either Viewpoint or from your computer's hard drive using the **Add/Remove Files** locally button.
- Click **Finish** and the new RFI will be registered and shown in the container.

b. Re-Direct/Forward an RFI to another user-

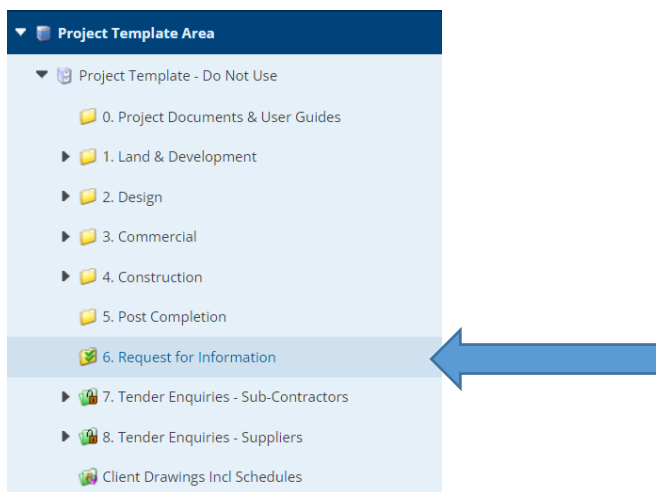
- In the RFI container go to the task and right click over the mouse icon and select **Redirect** from the drop-down menu.
- In the forward item window, select a new assignee from **Assigned to**.
- Enter the reason for changing the assignee in **Body Text**.
- You can add or remove **Recipients** (notified users) at this time.
- Press **OK** and the assignee will receive notification of the action required.

c. Responding to an RFI

- In the email the assignee receives there will be a link at the bottom called **view the container where this task was created**.
- A **Task View and Post** dialogue box will open, and the assignee can respond by text under the **New Posts Body text box** and/or by uploading attached files, again either from Viewpoint or from your computer. (Note: recipients will receive the same email but on clicking, the link will only be able to see the post threads and will not be able to comment).

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- Under **Assigned to** you must assign the response to someone, this will be the original assignee/design coordinator.
- Once filed in with a response press ok and the original assignee will receive an email notification of the response. Any people named as **Recipients**, e.g., Contracts Manager will also receive an email notification of the task progress.
- The original assignee/design coordinator will receive an email notification and either forward it on for further comment or if the assignee feels the query has been resolved he can forward it onto the requestor of the RFI and mark the task as **100% complete**.
- When the container list is refreshed the **Status** of the item will now be named as **Closed** due it being classed as **100% complete** and both the requestor and all recipients will receive notification of this status.



12. Discussion Container

Before users can create a new task or discussion, an administrator or super user needs to create a task or discussion container.

Discussions are used to create a forum style discussion on a subject. Progress can be monitored, and responses audited. Discussions can also be created and responded to using email.

a. Create Discussions

- Right click on a discussion container and navigate to **New > Discussion**. The new discussion will be created in this container. The **New Discussion** dialog will display.
- Enter the **Name** and **Priority** of the discussion.
- Enter the content of the discussion in **Body Text**.
- Use the **Timescales** section to define the due date of the discussion. If you want the discussion topic to be resolved by a specific date.
- Add the **Recipients** who should be included in the discussion.
- Select **Private** if only the users involved in the discussion should be able to view it.
- Select **Email** if the **Recipients** should be emailed about the discussion.
- **Optional:** Use the **Attachments** section to add attachments to the discussion.
- Click **Finish**.

b. Respond to a Discussion

- On the **Items** page of the container that contains the discussion, click on the **Name** of the discussion.

Consultant, Sub-Contractor and Supplier User Guide

- The Discussion View window appears.
- Under **New Post**, enter your content into **Body Text**.

*If you want to edit an existing post and you have the appropriate permissions, click **Edit Post** under **Discussion Posts**.*

- If you need to add more users to this discussion, add them in **Recipients**.
- If your post requires attachments to be clear, add them in **Attachments**.
- Click **OK**.

c. Respond to a Discussion using an Email

- From the email you received when the discussion was created, reply, and enter your post into the email.

Do not remove or change the subject line.

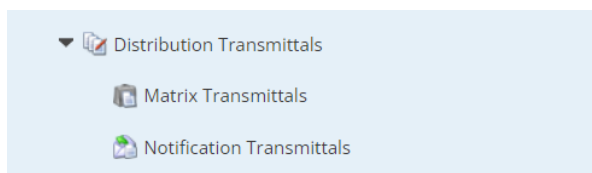
- Send your email.

d. Close the Discussion

- Right click on the discussion and click **Close**.
- Enter the reason that you are closing the discussion.
- Select the **Resolved** check box if the discussion is resolved.
- Click **OK** to close the discussion.

13. Notification Transmittals

Use notification transmittals to create a one-time announcement to a list of users with attachments from other areas of the enterprise. Notification transmittals are fully audited and recorded on the application and allow you to attach items on the enterprise itself without first needing to download them.



- Click on **Distribution Transmittals** and from the drop-down menu click **Notification Transmittals**.
- Click the **New** icon to create a new transmittal. This will open the Notification Transmittal details dialog.
- Enter the **Subject** of the notification, E.g., Groundwork's Tender Drawings.
- Enter a **Status** for the notification, E.g., Tender.
- Enter the message that will be sent to the recipients in the **Message Body** field, E.g., please find attached tender drawings.
- Use the **Recipients** section to select the recipients of the notification. You do not need to select a status, as it will default to the status already inputted.
- Use the **Attachments** section to add documents to the notification. These documents will be included in the notification.
- Click the **OK**.
- The notification will be sent to all the selected recipients. There will be a link at the bottom of the email stating '*To view the container where this Notification was created, please click here*'.
- On clicking this link, the user will be directed onto Viewpoint to the specific notification container where they can download the attachments.

14. Workflows

Workflows are created by the Viewpoint administrator and managed by the design coordinator they are used to control and review construction information before it is registered and visible within a document container, ensuring the correct quality checks have been made by all parties.

Sub-Contractors will only see drawings, which have been given the status A or B, these will be shown as orange & green dots next to the item in the container.

Drawing Status Key – Design Workflow

- Design Review
- Status A – No Further Comments
- Status B – Comments Advised
- Status C – Rejected

Drawing Status Key – Construction Workflow

- Construction Review
- Status A – No Further Comments
- Status B – Comments Advised
- Status C - Rejected

- **No Further Comments** status against a document means this is now ready for construction.
- **Comments Advised** status against a document means this is nearly ready for construction, all the comments made via the workflow are to be reviewed and amendments incorporated into the revised drawing.
- **Rejected** status means this it needs to be re-submitted for review.

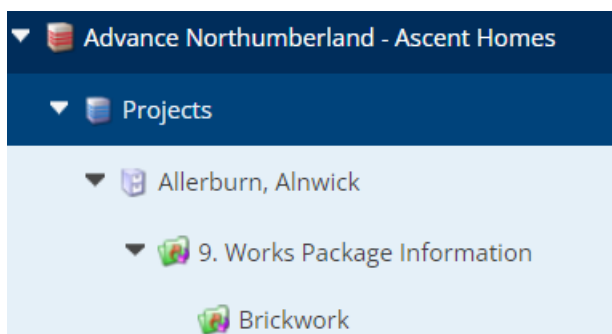
15. Create a Drawing Register/Issue Sheet

There is no longer a need for designers to provide a drawing issue sheet or to create a drawing register; this is recorded by Viewpoint.

- To view a drawing register, go into the container of the drawings you wish to create the register for.
- Go to **View** and from the drop-down menu click **Matrix View**, this shows the information for each drawing.
- Then go to **Export as Report** and click **Export** as an Excel document. This can then be saved or opened directly in Excel.
- In Excel you can manipulate the column widths, add lines to form a table, delete information you may not wish to see.

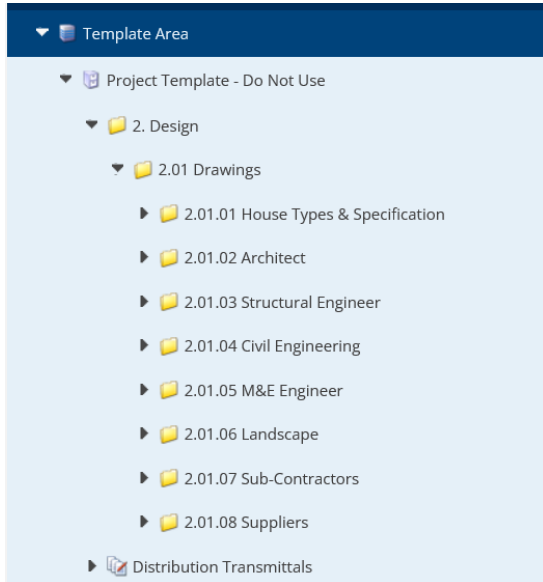
16. Navigation

Sub-contractors have access to the following containers. This is where you can find drawings issued and where you can upload your own design. A transmittal will be created by admin so they will be sent to your email once approved.



Each sub-contractor will only see their own container.

Consultants have access to the following containers. This is where drawings should be uploaded for approval.



Revision	Date	Description