System Help File

Expo-Net

Version 6.0

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Contents:

1. Login page

In the login page, enter the username and password provided to you by the technical support team. If you don't have a valid username and password, contact the technical support team at support@expo-net.co.il.

2. Selecting the language

Before logging into the system, you can select the interface language from the list of available languages.

3. Selecting a project from the list (Home page)

After logging into the system, a table listing all authorized projects is displayed. Updated information on new files, new messages, orders approved by the copy services, pending tasks, and meeting requests are shown on the project line. Click on the project name to open the project and navigate the system.

Project

1. Home page

The home page presents a table listing all authorized projects and updates on new files, new messages, orders approved by the copy services, pending tasks, and meeting requests.

You can access any project and switch between projects on this page.

Note: You can switch between the projects also by clicking **Select project** in the top frame (blue banner).

2. What's New?

This page presents the latest updates that require your immediate attention, including:

A. **New files** – New files uploaded by the project members that require your Action / approval.

Available actions:

- View File – Opens the file for viewing. To view CAD files, a viewer application must be installed on your computer (for more information, see Installations).
- Go To File – Opens the file folder. Several actions can be applied to the file inside the folder (see **File Actions** menu).
- Reset File – To delete the message, select the file and click **Reset Files**. Resetting a file represents a confirmation that will be recorded with the file details.

B. **Approved files** – Files you have uploaded to the system and which have been approved (reset) by the recipient of the message.

C. **New Messages** – Email messages sent to you by project members.
Available actions:

- Message subject – Click to display the entire message.
- Reply to sender – Click to send a response to the sender of the message.
- Reply to all – Click to send a response to everybody on the recipient list of the message.
- Reset message – To delete the message, select the message line and Click **Reset Messages**.
  Resetting a message represents a confirmation that will be recorded with the file details.

D. **Approved messages** – Messages you have sent and which have been approved (reset) by the recipients.

E. **Approved work orders** (Copy Center) – Copy center approval for receiving and completing work orders sent by you.
Available actions:

- Details – Clicking the **Details** icon displays the work order.

- Archive – To delete the message, select the order line and click **Move to Archive**.

F. **Pending Tasks** – New tasks that have been assigned to you by the project managers/members and require your attention.

Available actions:

- View – Click to view the task, update percentage completed, and implementation instructions.
- End task – To update percentage completed to 100% and delete the task message, select the task line and click **End Task**.

  Task details will be updated and the task will be saved in the Tasks Archive.

G. **Meeting Requests** – Meeting requests requiring your approval.

Available actions:

- View – Click to view the meeting request. The request can be printed or downloaded as a Word document.
- Meeting request approval – To approve a meeting request, select the request line and click **Approve Meeting Requests**.

  The approval will be recorded in the meeting request details, and it will be saved in the Meeting Requests Archive.

H. **Meeting Summary** – The meeting summary uploaded to the system by the project manager.

Available actions:

- View – Click to view the summary of the meeting. The meeting summary can be printed or downloaded as a Word document.
- Reset meeting summaries – To approve the meeting summary, select the summary line and click **Reset Meeting Summaries**.

  The meeting summary confirmation will be recorded and saved in the Meeting Summaries Archive.

Note: The What's New page displays project updates. In order to maintain the relevance of new data and to return proper feedback to the sender, the received messages and updates must be reset.

3. **Project Map**
   The GIS map of the project.

File Center

1. **File Explorer** – The File Explorer allows navigation between the various libraries in the project (similar to the Windows Explorer). Clicking the File Explorer displays the project directory tree.
   Files uploaded to the system are displayed as follows (from left to right):
   A. Number of the file in the folder.
   B. Date and time stamp of the file upload in the system.
   C. File name and version; the file version appears in brackets. For example: file(3).dwg.
   D. Comments – comments are written under the file name.
   E. File description – the file description as provided by the file sender.
   F. The name of the sender and the company.
   G. Details – mouseover on the **Details** icon displays the **File Actions** menu. See File Actions Manager.
   H. Selection field – used to select the files before applying actions to a group of files. See Folder Actions Manager.

   Note: The files in the folder can be sorted in ascending or descending order by clicking on the headings: date, file name, file description.

2. **New Files** – List of up to 500 files that have been uploaded into the system in the last 3 months, displayed as follows:

A. Number of the file in the folder.
B. Date and time stamp of the file upload.
C. File name and version – the file name and version (in brackets).
D. File description.
E. Sender name.
F. File location – the location of the file in the project directory
G. Details – displays the **File Actions** menu. See File Actions Manager.

3. **Search Files** – A search engine that allows searching files in the project directory tree by various types of content. Following is the search parameter list:
   A. Date range (from date to date) – the range of dates in which the files were sent.
   B. File name – the name of the file or a part of it. For example: F, to search for files containing the letter F.
   C. File type – search by file extension (tiff, pdf, xls, doc, dxf, plt, dwg, zip).
   D. File description – the description of the file or a part of it. For example: elevators. You can enter multiple search criteria to fine-tune your search.

   After specifying search parameters, click **Search Data**. The results are displayed in the following format:

   A. File number in the folder.
   B. Date and time stamp of the file upload.
   C. File name and version.
   D. File description.
   E. Sender name.
   F. File location.
   G. Details – displays the **File Actions** menu. See File Actions Manager.

4. **Upload Files**– click the **Upload Files** button to select and upload files to a folder of your choice. Clicking **Next Page** displays an entry box for every file to be uploaded. Proceed as follows to upload the file:
   A. Browse – click to select files on your PC.

B. File description – it is recommended that you enter a clear and descriptive property of the file to be uploaded (this will enable the other members of the project team to locate the file easily).
C. Program number – internal program number (optional).
D. Copy description from older version – re-uploading an existing file in the system updates the version number of the file. You can copy the file description from the existing file
E. Comments – relevant comments about the file.
F. Open zip files and display their content – allows loading zip files from your personal computer (with the Browser) and unzip them in a folder.
G. Related Files – allows attaching files to the basic file (XREF files, fonts, etc. may be uploaded). Enter the basic file in the **File Name** line using Browse and select **Related Files**. In the window that opens, select the files to be attached using Browse.

   Attachments may be added in two ways:

   - Selecting and adding files one by one, using Browse.
   - Adding all the directories containing files to be attached to a zip file. Select 1 in the number of attached files. Navigate to the zip file using Browse and select below the file entry **Open zip files and display their contents**.

   To complete, click **Attach Related Files.**

   Uploading dwg files in this manner allows both viewing the basic file and the attachments, and downloading the file including the attachments.
H. Lock File – Allows loading locked files to the system (these files cannot be viewed or downloaded).

After entering the file details, a list of authorized project members is displayed under the file boxes. You can select users to be notified of the file upload to the system by email/fax. A message about each file will be sent to the mailboxes of the recipients, and it will appear together with file details on their What's New? page.

To complete the upload, click **Upload Files** . The system will display the estimated completion time and a successful completion message after the files have been uploaded.

Note: Files can be uploaded to the folder from the File Explorer as well. In folders in which you have upload rights there is the **Upload Files** button at the bottom of the directory. Click this button to upload the files as described above.

5. Recycle Bin – Files deleted from project folders appear in the Recycle Bin. Click **Recycle Bin** to search for deleted files by range of dates, file name, type, and description. The results are displayed in the following format:
   A. File number in the folder.
   B. Date and time stamp of file upload.
   C. File name and version (in brackets).
   D. File description.
   E. Sender name.
   F. File location.
   G. Details – displays the menu that allows viewing, downloading, deleting, and restoring deleted files.
      To perform an action on a group of files (download files as zip, delete, restore), select the files and click **Go.**

Users and Groups

1. **Members** – List of the authorized users of the project and their details (click the **+** icon to display more details).
   Clicking **Details** allows:
   A. Sending an email message to a user/member.
   B. Adding details of a member (personal details, telephones, email, etc.) to Microsoft Outlook.
   C. Calling a project company through Skype.

D. Contacting a project member through Messenger.
E. Sending a message to or initiating a conference call through Skype with a group of contacts. In the selection field, mark the contacts you want to reach, select an action from the folder menu located at the bottom left, and click **Perform**.

2. **Tasks –** Tasks search engine. Following is the list of search parameters:
   A. Date range (from date to date) – search for tasks by the deadline date range.
   B. Task initiator – search for tasks by sender. Select a sender name from the list to display the tasks received from this sender.
   C. Assigned to – search for tasks assigned to other recipients of my tasks. Select a name from the list to display all the tasks assigned to this recipient.
   D. Task subject – search for tasks by subject.
   E. Task number – search for tasks by serial number.
   F. Tasks status – search for tasks by status (use to display all tasks / completed tasks / uncompleted tasks).
   G. Selecting **Display Tasks in Recycle Bin** displays also the tasks that have been deleted.

   To complete the search, click **Search Tasks**. Search results are displayed in the following format:
   A. Task number – the serial number of the task in the system.
   B. Start date – the date on which the task was sent.
   C. Task subject – the subject of the task.
   D. Due date – target completion date.
   E. Task recipients – other recipients related to the task. Click on the icon to display the job title of the task recipient (task leader / task owner / to be informed), percentage completed, implementation instructions, as reported by recipient.
   F. Sent by – name of the task initiator.
   G. Source – for tasks originating from a protocol of a meeting, date, and meeting topic.

H. Completion – percentage completed, date and time of update.
I. View – mouseover the icon displays a task actions menu, including the following options:
    - Display task – display and update task details. You can update the percentage completed and add free text comments. To complete the update, click **Update and report Task**.
    - Forward task – pass the task to another owner. You can edit the task details, specify a deadline, and add task recipients / external task recipients. To complete forwarding the task, click **Add Task**.

J. Selection field – mark to apply an action to selected tasks. To update the percentage completed of the task to 100%, select relevant tasks, then select **Complete Tasks** from the folder menu (bottom right), and click **Go**.

3. **Project calendar –** the calendar of project events. The event details are displayed on the date of the event.

   Available actions:

   A. View event – click the title to open a window with the event details:
      - Date and time of event
      - Event subject
      - Event content
      - Project – the name of the relevant project
      - Sent by – project initiator name
      - Invitees – event participant list

   The event initiator can edit or delete the event.

4. **Meeting requests** – a search engine for meeting requests sent to you. Following is the list of search parameters:

   A. Date range (from date to date) – search for meeting requests by date range.
   B. Meeting initiator – search for meetings by meeting initiator.

C. Invitees / recipients – search by meeting invitees.
D. Meeting topic – search for meetings by topic.
E. Search words – search by search words displays a list of meeting requests that contain the entered text.
F. Meeting number – serial number of the meeting request in the system.

You can enter multiple search criteria to fine-tune your search.

After specifying search parameters, click **Search Meeting Requests**. The results are displayed in the following format:

A. Meeting date – the date and time of the meeting.
B. Meeting topic.
C. Meeting initiator – the name of the team member who has called the meeting.
D. Project name – the name of the project mentioned in the meeting request.
E. Recipients – a list of recipients related to the meeting. (Clicking the envelope icon allows to check whether and when the meeting request has been approved).
F. Status – click the status icon to show whether the meeting has taken place / was postponed.
G. Details – mouseover the details icon displays the **Action** menu, including the following options:
    - View meeting request – allows viewing the meeting details. The request can be printed or downloaded as a Word document.
    - Download document – downloads the meeting request as a Word document to your computer.
    -

5. **Protocols** – a search engine for meeting summaries sent to you. Following is the list of search parameters:
    A. Date range (from date to date) – search for meeting requests by the meeting date range.
    B. Meeting initiator – search by the name of meeting initiator.
    C. Meeting summary recipients – search by meeting invitees.

D. Task assigned to – search for meeting summaries by recipients of tasks assigned in the course of the meetings.
E. Meeting topic – search by the topic of the meeting.
F. Search words – search by search words displays a list of meeting summaries that contain the entered text.

You can enter multiple search criteria to fine-tune your search.
After specifying search parameters, click **Search Meeting Summaries**. The results are displayed in the following format:

A. Meeting date – time and date of the meeting.
B. Approved / Sent by – it is possible to forward the protocol of the meeting for approval before distribution. If there is a specific person authorized to approve the protocol, his/her name is recorded.
C. Meeting topic – the topic of the meeting.
D. Meeting participants – a list of all invited / attending project members (clicking an icon shows whether the project member was invited / attended / confirmed the meeting).
E. Details – mouseover the details icon displays the **Actions** menu, including the following options:
    - View meeting summary – displays the protocol details (recipients, protocol, tasks following from the meeting summary). The meeting summary can be printed.
    - Download document – Download meeting summary as a Word document to your computer.
F. Tasks – a list of tasks sent to you following from the meeting summary:
    - Task subject.
    - Start date – the date on which the task was assigned.
    - Deadline – the date by which the task must be completed.
    - Task recipients – a list of the task recipients. Mouseover the icon displays additional details, including the percentage completed for every recipient.

- Source – the date and time of the meeting summary in which the tasks have been assigned.
- Status – the status of the task as defined by the task initiator (to be started / in progress / completed).
- Details – mouseover Details displays a **Task Actions** menu (see Tasks).

Mail Center

1. **Inbox** – a list of incoming messages sent to you by project members. Messages are displayed in the following format:
   - Date – the date on which the message was sent.
   - Subject – click on the message subject to display the message in full.
   - Sender – the name of the message sender.
   - Confirmation – the date and time of message confirmation.
   - Reply – click to reply to sender.
   - Reply to all – click to reply to all message recipients.
   - Selection field – check to apply an action to selected messages. Select relevant messages, select an action (confirm, delete, move to message archive) from the folder menu (bottom left), and click **Perform**.

2. **Outbox** – a list of messages sent by you through the system to project members, in the following format:
   - Date – the date on which the message was sent.
   - Subject – click on the message subject to display the message in full.
   - List of recipients – the list of message recipients and the time and date on which they confirmed the message.

- Selection field – check to apply an action to selected messages. Select relevant messages, select an action (confirm, delete, move to message archive) from the folder menu (bottom left), and click **Perform**.

3. **Send mail** – sends mail through the system. Click **To/CC/BCC** to display the project member list and select recipients by type, then click **Add to List**. Add a subject and content and click **Send Message**.
4. **Mail Archive –** incoming messages moved to the message archive.

Copy Centers

1. **Reports** – a search engine for work orders sent by you to the copy services. You can search by date range, copy services, and the work order number. Work orders are displayed with the time stamps of their confirmation and completion. Click on the **Details** icon to display the contents of the order. If the order has not yet been confirmed by the copy services, you can edit it and resubmit.
2. **File store** – click to display the files that were moved to the file store and were not submitted to the copy services yet.
3. **Blank order** – in cases of originals that require calling a representative from the copy service to perform the work, fill in a blank order and add the order details (page size, kind of work, number of copies). In the comments window, you can enter the details of the required job.

Settings

1. **My profile** – use to update the user profile and company details.
2. **My settings** – preview, security, and file viewing settings.
   A. Preview – use to define a preview for CAD files in the system.
   B. Security settings – use to define a fixed IP address from which to log in to the system.
   C. Viewer – CAD files can viewed by Expo-View or by a local viewer installed on your computer.
3. **Sys Check** – runs tests on the PC of the user / project member to collect technical specifications of the computer (for purposes of technical support).

Action Managers

1. **File Action Manager** – click the **Details** icon to display a list of file actions:

   View file **–** activates a viewing program from the server, performs redlining, and more.

   Download file – downloads files to your computer:

   - Download file – downloads the file as is.
   - Download as zip – downloads the file zipped.
   - Download history – downloads the file including its previous versions.
   - Download attachments – downloads a dwg file including attachments.

   Edit file – edits the file description and the comments.

   Lock/unlock file – locking a file prevents access to it by other project members; unlocking the file removes the restrictions.

   Send file:

- Send memo – sends a reminder to project consultants who have not yet received notice of the file upload to the system.
- Send file by email – sends a file by email.
- Send file to an order form – sends an order form to the copy services (see **Copy Services**).

Delete file – deletes a file from the folder and moves it to the Recycle Bin.

Copy file – two options:

- Copy file – copies the file to a different folder.
- Transfer file – transfers the file to another folder (the original is deleted).

History – displays a list of the previous versions of the file.

Details – displays the file details (name, description, location) and actions performed on the file by its recipients (confirm /view / download).

2. **Recycle bin manager** – click Details to display a list of file actions:
    - View file – runs a viewing program from the server, perform redlining, and more.
    - Download file – downloads the file to your computer.
    - Delete file – deletes the file definitively from the system.
    - Restore file – restores the file to its original folder (from which it was deleted).

3. **Folder action manager** – You can perform actions on any number of files in the system. Next to each file is the file marker (empty field), allowing you to select files and choose an action to perform from the frame at the bottom. Available actions (from top to bottom):
    - Download as zip – download selected files to your computer as a single zip file.
    - Download with related files – download selected files to your computer as a single zip including attachments.

- Lock files – lock selected files.
- Unlock files – unlock selected files.
- Send by email – send selected files in an email message.
- Send files to order form – send selected files to an order form – copy services.
- Delete files – move selected files to the recycle bin.
- Copy files – copy selected files to another folder.
- Move files – move selected files to another folder.

4. **Email action manager** – You can perform actions on a group of files in the system. Next to each file there is a selection field (an empty cell), used to select files and apply an action to them, selected from a menu displayed in the frame at the bottom.
   Available actions (from top to bottom):
   - Confirm messages – confirms the message and sends a confirmation to the sender.
   - Delete messages – deletes selected messages definitively.
   - Archive – moves selected messages to the archive tab.

5. **Tools and installations** – You can install a viewer program that integrates into the system and allows the viewing of CAD files directly from the browser, without having to download them to your computer. In addition, the viewing program provides a range of tools to use on the file being displayed:

   Top bar:
   - Print – sends the file to your printer.
   - Center the file – restores the file to its original state.
   - Reduce – reduces the entire sketch by the same scale.
   - Enlarge – enlarges the entire sketch by the same scale.
   - Undo – cancels the last action.

- Define area – click and define a portion of the sketch to view it in full size.
- Move – click and mark directly on the sketch to move the sketch from the one point to the next.
- Rotate – click to rotate the sketch by the required number of degrees.
- Layers – click to view in detail the layers that make up the file. You can remove the selected layers and view the file without them.
- Background – use to change the background of the sketch; you can select a black or white background.

Bottom bar:

- Scale bar – click and choose a distance on the sketch to calculate width, length, and height.
- R – click to open a toolbar that allows entering comments on the sketch and sending them to other project members.
- / **-** Click to draw a red line between two selected points.
- Stretch tool – click to mark a straight line' break it' and delineate it.
- Ellipse – click to draw an ellipse on the sketch.
- A – click and choose the size of the box, add free text, and save it on the sketch.
- Undo – cancels the last action performed on the sketch.
- Delete – click and define an area of the sketch to erase all changes made in that area.
- Authorized members – click to display a list of the project members. You can selectively allow viewing access to the comments you have made on the sketch.
- User redline – displays a list of project members who have added comments to the file. You can display or hide individual comments.

To install, open System file **>** File explorer **>** Technical support. In the technical support folder open the ExpoViewSetup.exe file menu and choose **Download File**. Save the file to your computer, then double-click it. Continue with the installation process until it is completed.