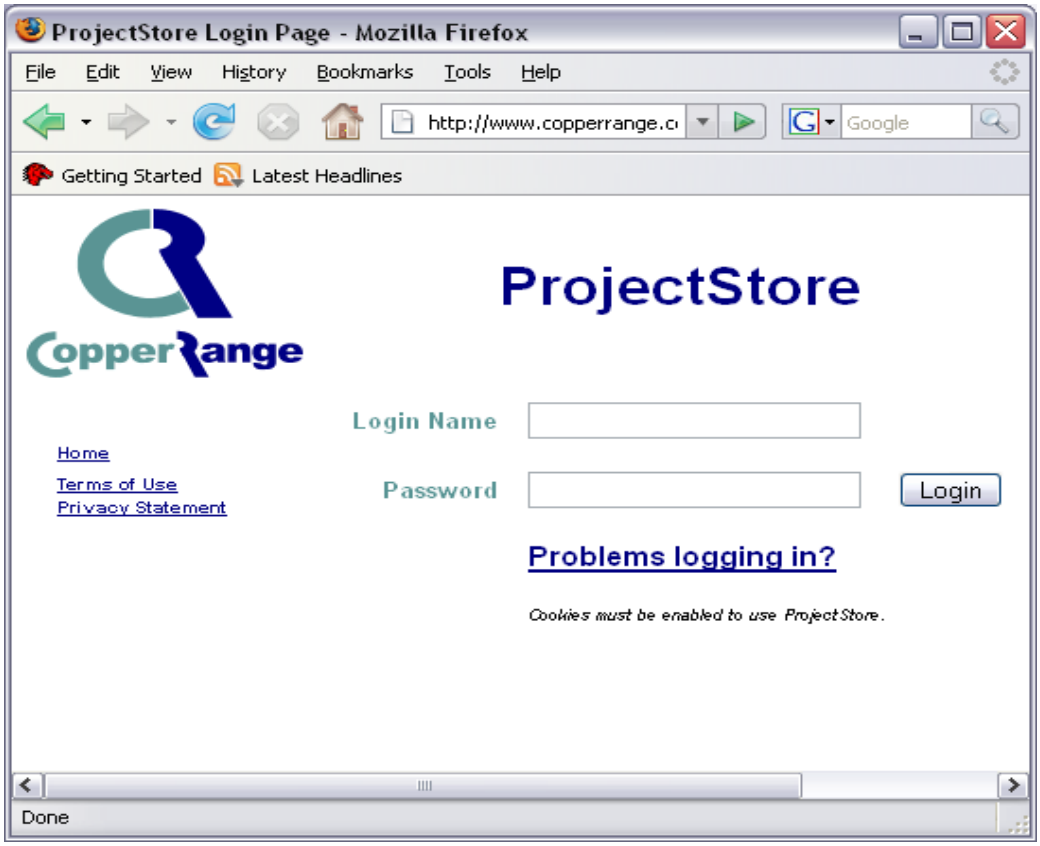
Copper Range CR™

ProjectStore Manual

System Requirements

All that is required to run ProjectStore is a Web browser that is configured to accept cookies and implements the latest Web standards from the World Wide Web Consortium. Acceptable browsers include Internet Explorer version 5 or higher, Netscape 6, and Mozilla. Note that cookies are used only for improving efficiency and are NOT used to track user movements on the Web site or to collect personal information. For more details about users' privacy while using ProjectStore, please see the Copper Range Privacy Statement.

Logging into ProjectStore



On the ProjectStore Login Page, type in the login name and password you chose at registration time. Login names are unique for every ProjectStore user, and passwords must be at least 6 characters in length. Users can change their login name and password at any time by editing their *Profile*. Should you forget your login name and/or password, there is a link on the Login page that will run you through a procedure to have ProjectStore e-mail them to you.

User Roles

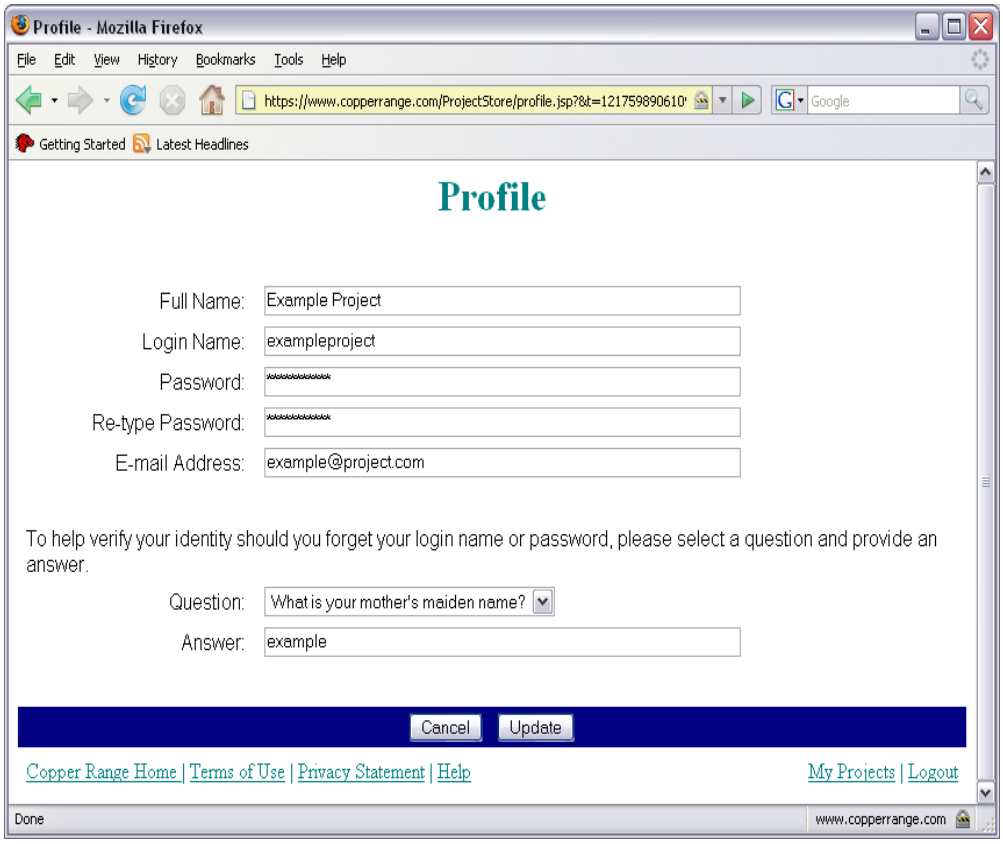
- *Supervisor* – Supervisor can add and remove Administrators from their account, and the Supervisor can pass the Supervisor role to another Administrator

- *Administrator*—only users who have been given this role by Copper Range have permission to create projects. These users have been designated to have administrator privileges by the person who set up your organization's account with Copper Range. Projects are created by hitting the **New Project** button on the main Projects page. If no such button exists, then you do not have Administrator privileges. After hitting the **New Project** button, a form appears where an Administrator can enter project information and select project participants.

- *Colleague*— Colleague can conditionally add and remove documents and folders within the projects for which they have been granted access and can download/read documents.

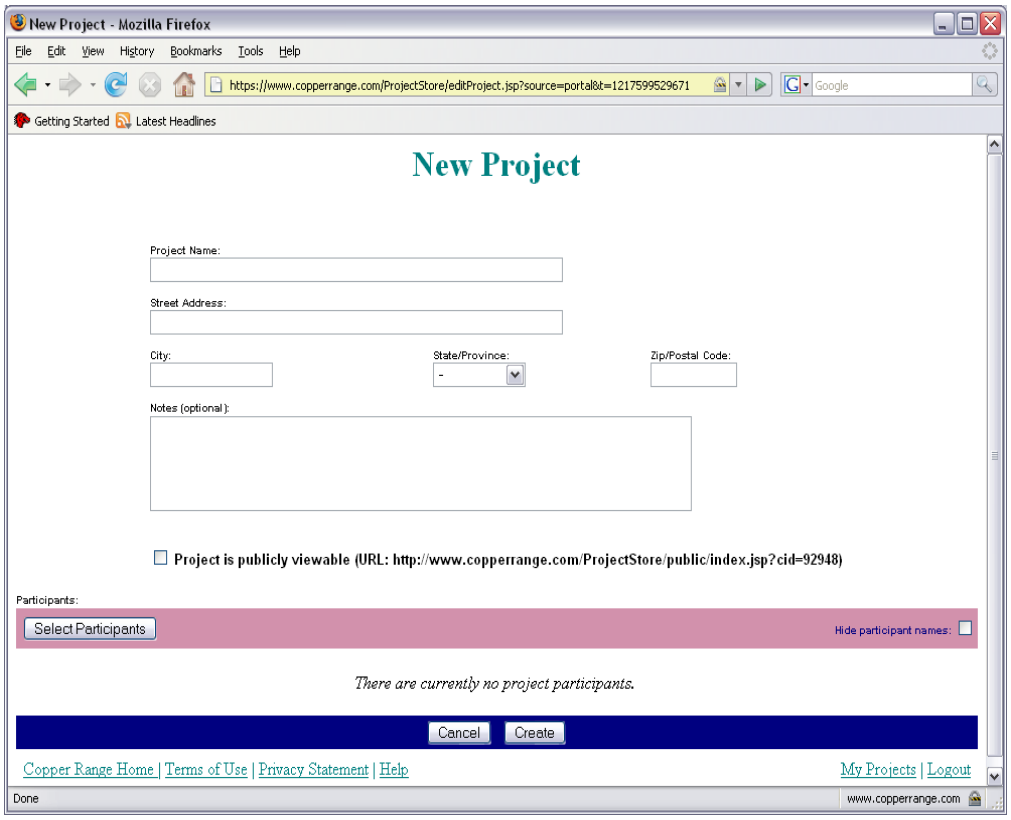
***Note**: Both the Supervisor and Colleague role can view archives.

Profile



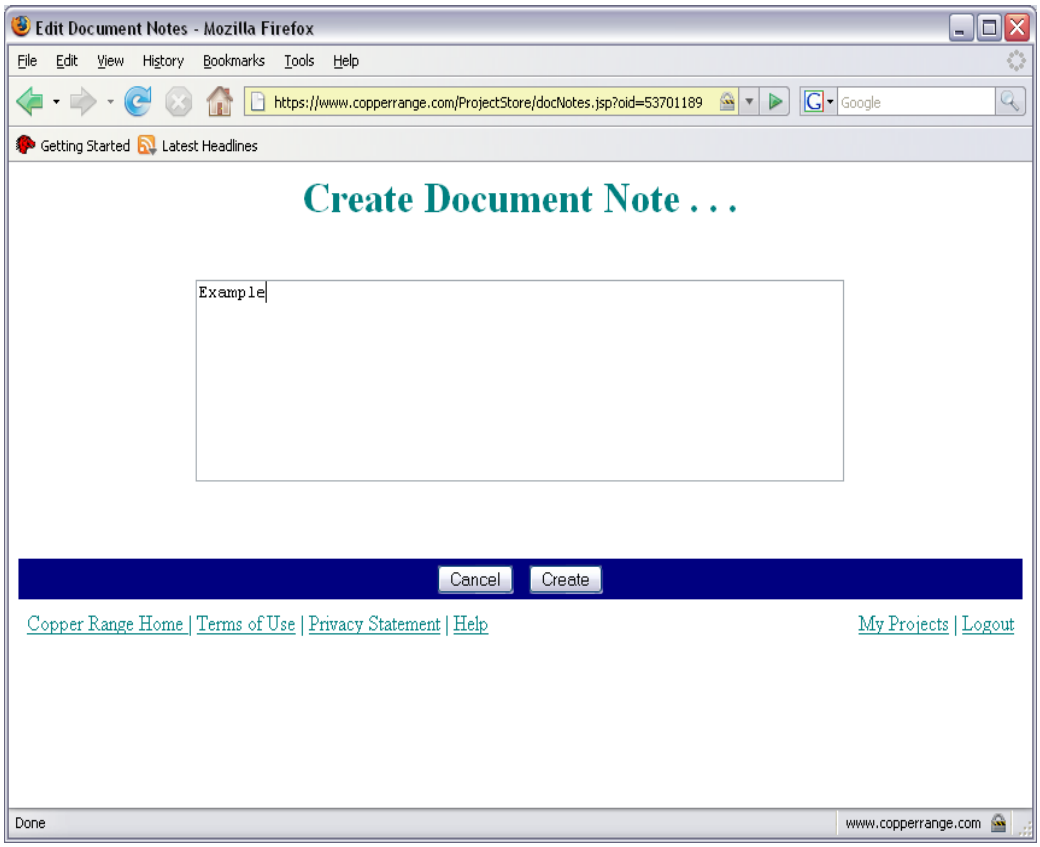
A user's *Profile* contains system information about that individual including their full name, login name, password, and e-mail address. Each user can change this information by editing their Profile. To edit a Profile, hit the **Profile** button on the main Projects page.

Create a Project



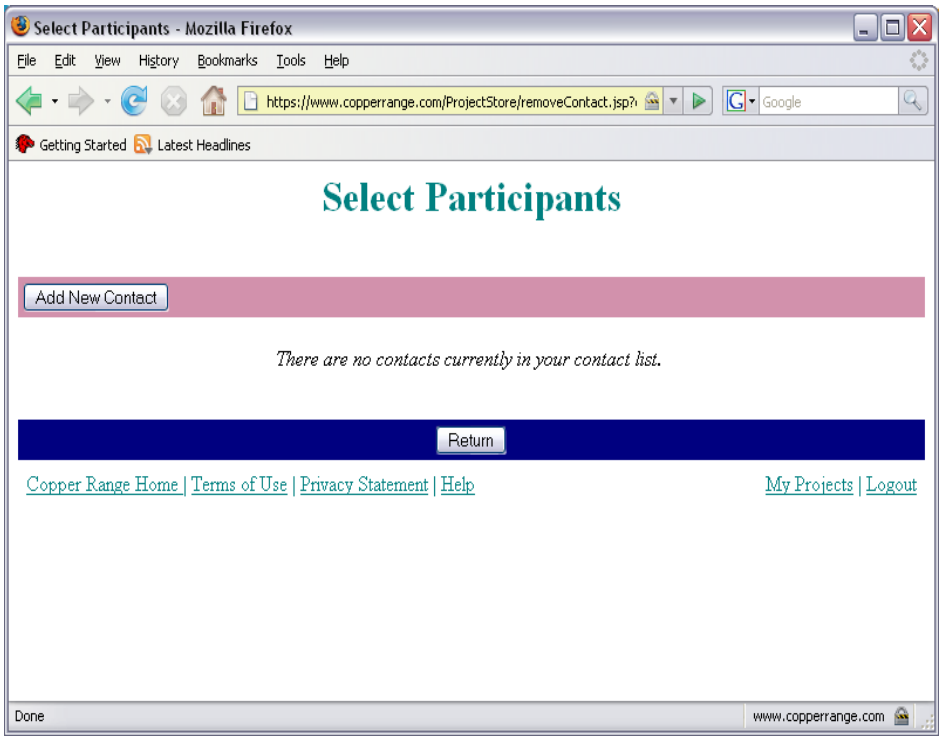
Projects are created by hitting the **New Project** button on the main Projects page. If no such button exists, then you do not have Administrator privileges. After hitting the **New Project** button, a form appears where an Administrator can enter project information and select project participants.

Create a Note



You can add a note to a document—you and allowed participants can see.

Invite Participants



Participants are added to a project from the Edit page for the project by hitting the **Select Participants** button. Once this is done, a list of the Administrator's contacts is shown from which project participation can be selected by checking the checkbox next to each contact's name. New contacts can be added from this page by selecting the **Add New Contact** button. Note that the creator of a project, the project Administrator, is always considered a project participant.

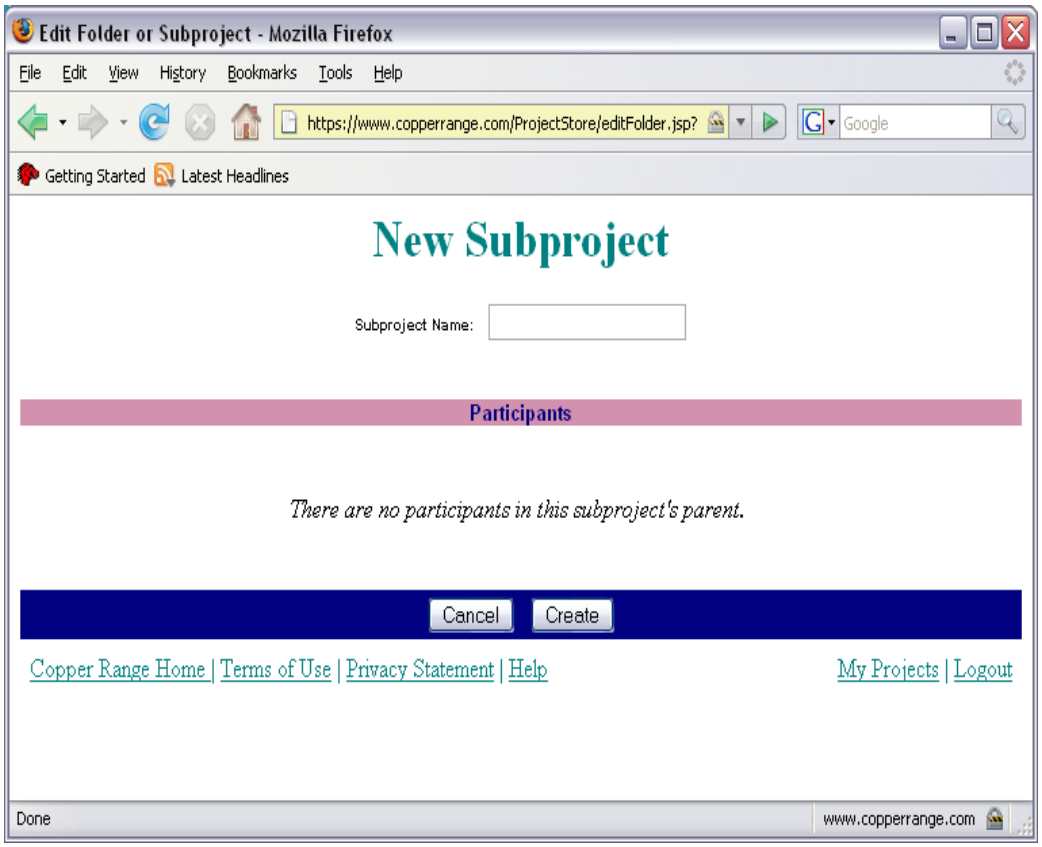
Hiding Participants

By default, all project participants can see the names and e-mail addresses of all other project participants. This feature is useful should one participant wish to contact another. But, in certain circumstances a Project Administrator may wish to hide participant names and e-mail addresses from the other project participants. A Project Administrator can do this by checking the **Hide Participant Names** checkbox in the **Participants** section of a project's Edit page.

Granting Upload Privileges to Participants

By default, project participants other than the Project Administrator cannot upload files to a given project nor can they create folders. But, a Project Administrator can grant file upload privileges to project participants of their choosing. Participants with uploading privileges may then upload files or create folders within any project folder or subproject to which they have access, and they may delete any file or folder that they may have uploaded or created. To grant uploading privileges, check the **Upload Permission** checkbox associated with any project participant in the **Participants** section of a project's Edit page.

Create a Sub-Project



Subprojects are essentially the same as folders except that Project Administrators can restrict access to subprojects to a subset of a project's participants. Subprojects can only be created in the topmost level of a project or within another subproject. Project Administrators create subprojects by hitting the **New** button on a project's File List page and then selecting the **Subproject** option in the popup menu.

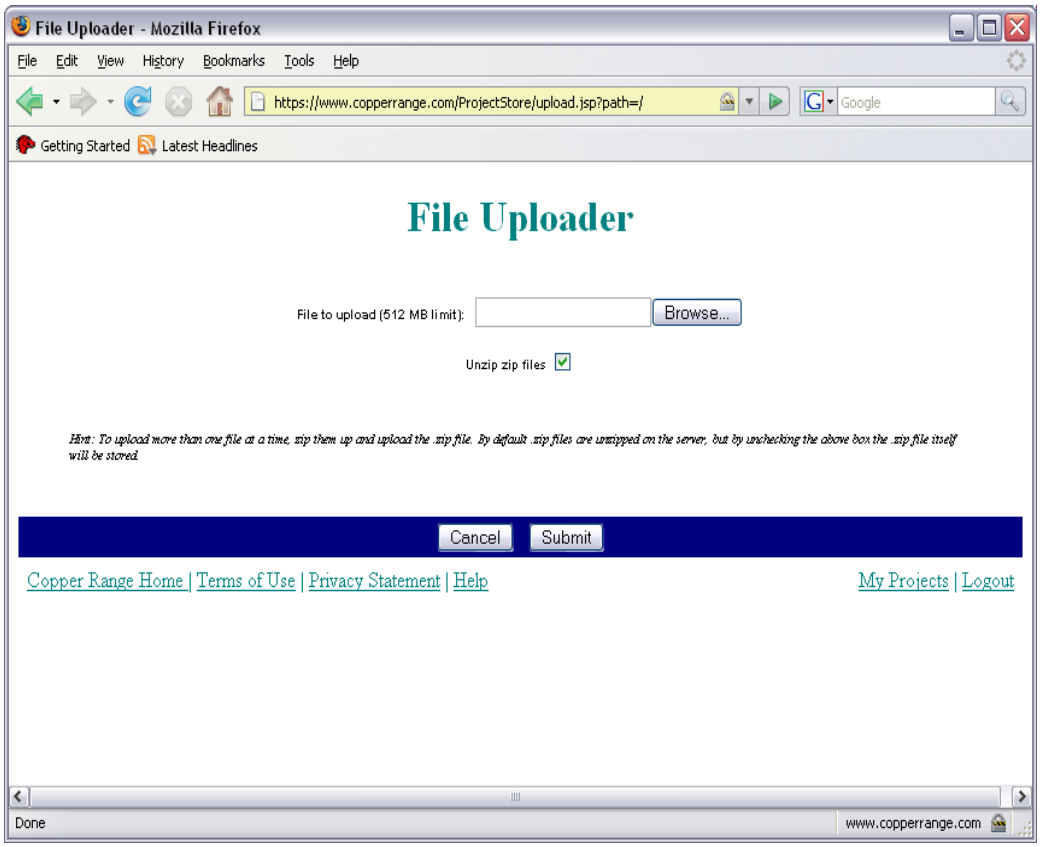
Editing Sub-Projects

A Subproject can be edited by a Project Administrator by selecting the **Edit** link in the entry for the subproject on the File List page. Editing operations include the renaming of subprojects and the adding and removing of subproject participants

Create a Folder

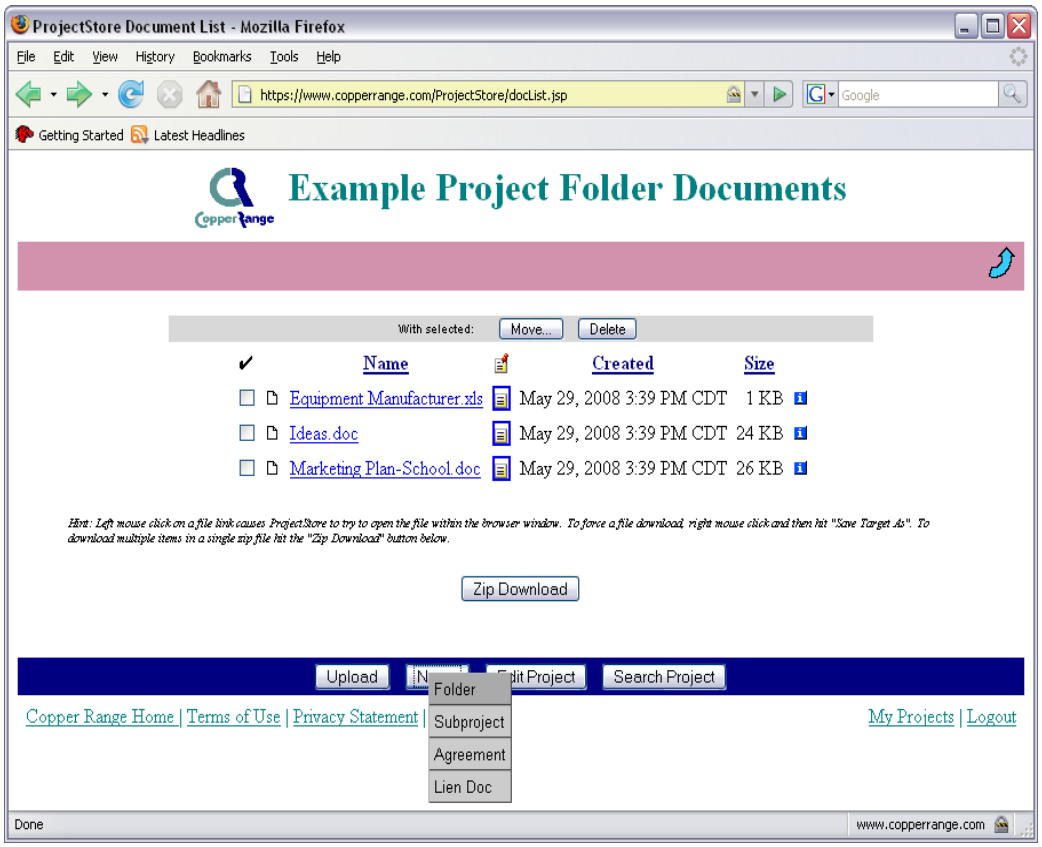
To aid in organizing files within a project, ProjectStore allows Project Administrators and non-Administrators with upload privileges to create folders. Authorized participants can create a folder by hitting the **New** button on a project's File List page and then selecting the **Folder** option in the popup menu.

Upload Files



An Administrator or a non-Administrator with upload privileges can upload files from their local machine to ProjectStore. This is done by selecting the **Upload** button on the File List page for a given project. Note that multiple files can be uploaded at one time if they are zipped up first. By default, ProjectStore will automatically unzip them when placing the files into a project's store. To upload the zip file itself and not have it unzipped on the server, uncheck the "Unzip" checkbox on the File Upload page.

View Files



To view files on your computer left mouse click the file's name in the list of files for a given project. ProjectStore will attempt to open the file in your Web browser window, if you have an application that can view the file and the application is structured to run in a Web browser (e.g. Acrobat Reader for .pdf files). If you don't have an application that can view a particular file type, your Web browser will typically ask you to download the file to your local machine. If you have an application to view a particular file but the application is not structured to run within your browser, your browser will ask if you want to open the file. If you say yes, your browser will start the application in a separate window and import the file you selected.

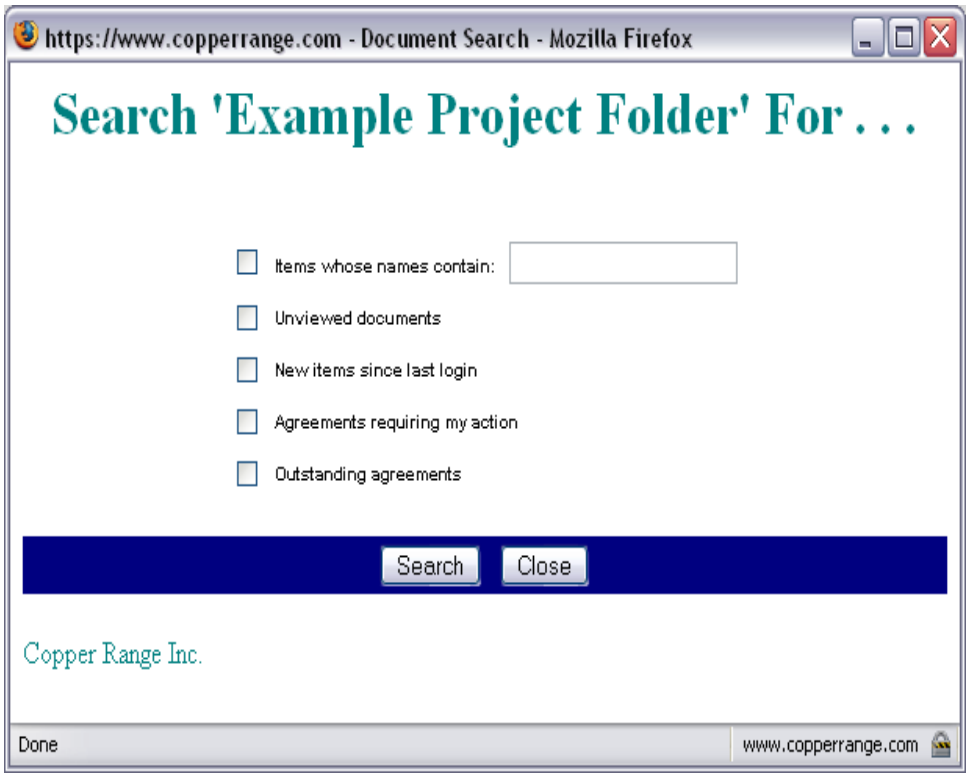
Download Files

You always have the option to force a download of a file stored in ProjectStore to your local machine. Right-click the mouse on a file's name in the list of files for a given project. In the popup menu that appears, select **Save Target As** and your browser will walk you through the steps to save the file. To download multiple files at one time, you can have ProjectStore zip files that you select and then download the generated .zip file to your computer. To do this, hit the **Zip Download** button and then check the checkbox next to the names of the files you wish to download. Note that if you check folders or subprojects, all of their contents will be downloaded as well.

Navigating Subprojects and Folders

Project Administrators can create subprojects and folders, and non-Administrators with upload privileges can create folders within a project to help organize the storage of project files. To view a subproject's or folder's contents, click on the subproject or folder name in the File List view of a project. To move back to a parent project, subproject, or folder, click on the blue up arrow icon in the upper right corner of the page. Remember, the browser's **Back** button may take you back to a parent project, subproject, or folder too, but the **Back** button always takes you to the last viewed Web page, which may or may not be the current subproject's or folder's parent.

Search Feature

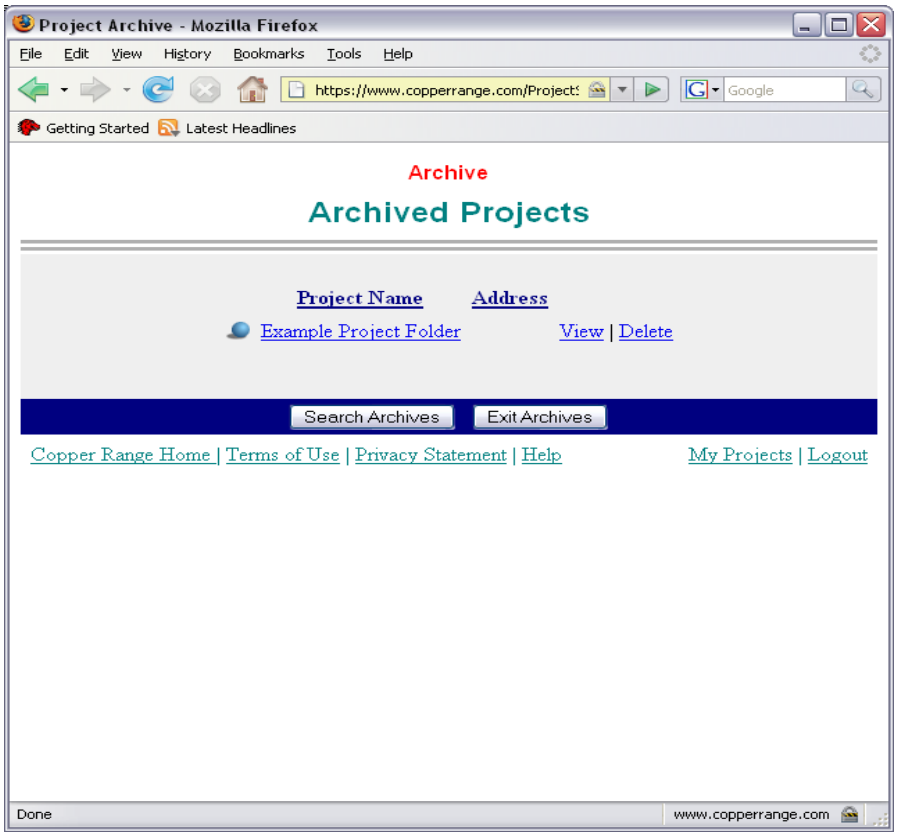


Any project participant can search for files, folders, and subprojects within a given project by clicking on the **Search** button at the bottom of the project's File List page. Project participants can constrain searches based on a number of conditions including item names, unviewed items, or items new since last login.

Automated Email Messages

Certain actions taken by project participants cause ProjectStore to automatically send e-mail messages to the other project participants alerting them to those actions. Project participants receive e-mail messages from ProjectStore when they are added to a project, deleted from a project, when new documents are added to a project, and when documents are deleted from a project. If a project participant is not presently a registered user of ProjectStore, ProjectStore will e-mail instructions to the person explaining how to register.

Archive



Archiving a Project

If your company has contracted with Copper Range for project archiving, then project administrators have the option to archive any project that they administer. To archive a project, select the **Archive** link for the project on your Project List page. Be forewarned that once a project is archived only the project administrator may view and download the contents of the project.

Browsing the Archive

To browse the Archive, select the **View Archives** button on your Project List page. A list of archived projects will then be displayed and the contents of any project can be viewed by selecting the name of the project of interest. The viewing of a project's documents, folders, and subprojects is performed much as the viewing of documents, folders, and subprojects in an active project. Note that documents, folders, and subprojects in an archived project are read-only, that is, no new documents can be uploaded, new folders or subprojects cannot be created, documents cannot be deleted, etc.

Making Archived Items Active Again

There is no switch that can turn an archived project back into an active one. But, any items in an archived project, such as documents or folders, can be downloaded by you to your computer and then you can upload them into an active project.

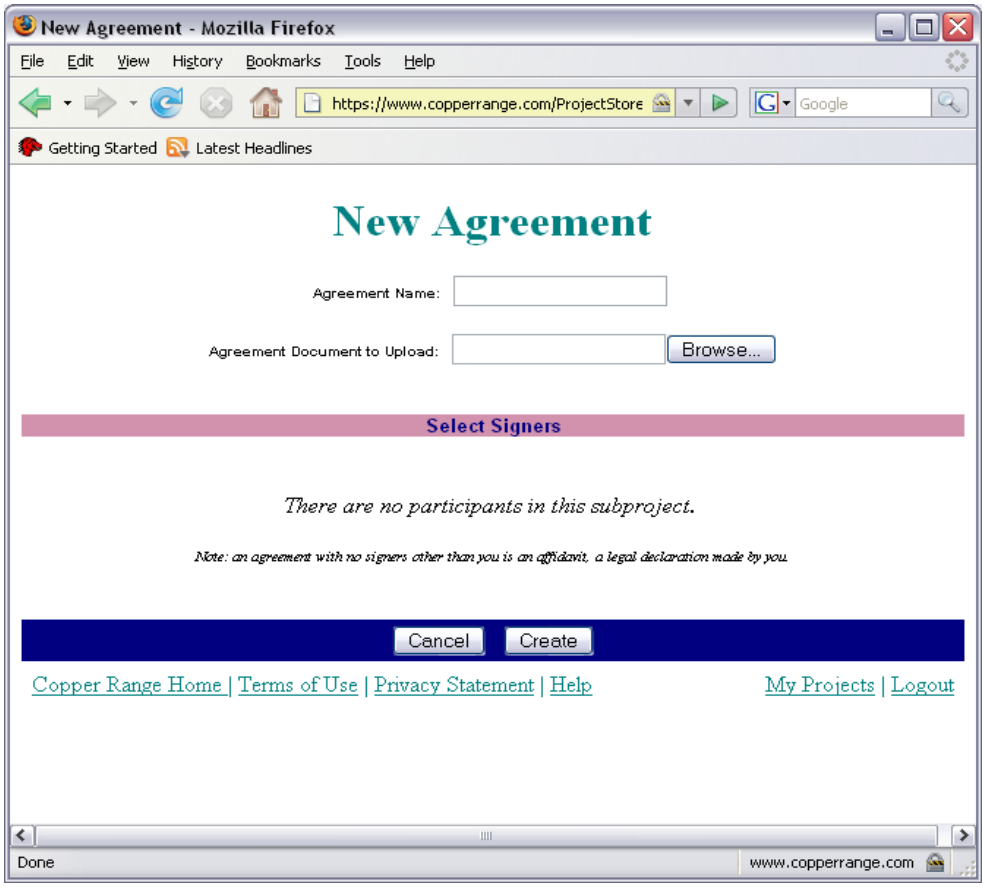
Deleting Archived Projects

Archived projects can be deleted at any time by their administrators. To delete an archived project, select the **Delete** link associated with the project on the Archived Project List page. Use caution when deleting a project as it and all of its contents will cease to be accessible by you or anyone else.

Getting Archive Usage Reports

The designated Supervisor for an account may view archive usage reports online. To do so, hit the **Accounts** button at the bottom of your Project List page. At the bottom of the resulting Account page, hit the **Archive Usage** button. You will then see a summary of the storage and bandwidth used for all your company's archived projects for the current month. In general, the usage reports for archived projects work the same as the usage reports for active projects.

Agreements



Creating an Agreement

A *ProjectStore Agreement* is a legally binding agreement among designated project participants. Only Project Administrators whose organization has contracted for the ProjectStore Online Assent option may create an agreement. Agreements are created by hitting the **New** button at the bottom of the File List page and then selecting the **Agreement** option in the popup menu. Once this is done, a form appears where an Administrator can choose an existing document that will form the basis for the agreement, and choose who will be a party to the agreement. Note that an agreement can only be

created within the top level of a project or within a subproject. Furthermore only participants in the project or subproject where an agreement resides may be designated as parties to the agreement. Project or subproject participants who are not designated as parties to the agreement may only view the agreement.

Signing an Agreement

Once an agreement is created, all designated parties are invited to sign the agreement. An agreement is signed by a designated party by hitting the **Sign** button at the bottom of the Agreement View page. Note that the act of selecting the **Sign** button results in a legally binding signature as dictated by the United States Electronic Signatures in Global and National Commerce Act, the Uniform Electronic Transactions Act, and the Copper Range Terms of Use Agreement that all designated parties agreed to as a condition for using Copper Range ProjectStore.

Requesting an Agreement Be Voided

The creator of an agreement can request that the agreement be voided at any time after the agreement's creation. To request a void, the agreement's creator clicks the **Void** button at the bottom of the Agreement View page. Note that the agreement will not actually be voided until all parties who have signed it agree to the void request. Any designated party to the agreement who has not signed it prior to the void request is further prevented from signing the agreement. If the agreement has no signers or the agreements' creator is the only signer, then the agreement is voided immediately. All parties to the agreement are automatically notified by e-mail that the agreement's creator has requested that the agreement be voided.

Concurring with a Void Request

All signers of an agreement must concur with a void request before the agreement is actually voided. Signers of the agreement concur with the void request by hitting the **Void** button at the bottom of the Agreement View page.

Agreements Cannot be Altered

Once an agreement is created it cannot be altered or moved from one project or subproject to another, and the agreement can only be deleted by completing the voiding procedure as outlined above. Furthermore, parties to an agreement cannot be removed from the project or subproject within which the agreement resides. This policy ensures that all designated parties always have online access to the agreement.