Get started with

![Interaxo logo]

CONTENTS

1 INTRODUCTION

1.1 My overview

1.1.1 My rooms, content and entries with due date

When you enter Interaxo or choose a new community, you will first get an overview of this specific community. The overview shows you:

- **My rooms**: the rooms you have access to in that community
- **Entries with due dates:** an overview of all the activities that have been assigned to you in the community Overview 'My room'
- **Content:** locked documents (Edit) and your 'Last edited' documents

My rooms

This is an overview of all the rooms you are a member of in the selected community. To return to this overview when you are in a room, click on the logo in the top left corner (this may be the Interaxo logo or a company logo).

Favourites

If you are a member of several rooms, you can easily set one or more as favourites. This will give you faster and easier access to the rooms you use most.

Favourite rooms have a solid yellow star in front of the name:

- Click on the star in front of the name to set a room as your favourite.
- Click on the star again to remove it from the list of favourites.
- Click on the 'Favourites' button in the drop-down menu to narrow down the list and see only your favourites.
- Click on 'All rooms' to see all the rooms.

1.1.2 Switch between communities

The rooms you have access to may be in different communities. If so, you can switch between them like this:
In the top left corner of the page, next to the logo, click on the community name and choose another from the drop-down list.

1.1.3 Switch between rooms in the community

If you have been invited to different rooms in one or more communities, you can easily switch between them like this:

At the top of the page, click on the currently selected room and choose another from the drop-down list.

1.1.4 Entries with a due date

Open a task by clicking on one of the entries in the list.

1.1.5 Content

Open a file by clicking on its name in the list. Change the list by selecting either 'Edit' (files that are locked for editing) or 'Last edited' (i.e. by you) from the drop-down list.

1.2 Folders

Differences between the folder types

Difference between the folder types	Simple folder	Active folder	Active folder with workflow
Add and work with files	x	x	x
File versioning	x	x	x
Share information	x	x	x
Logs and traceability		x	x
Comments		x	x
Additional file information (metadata)		x	x
Due dates		x	x
Responsibilities		x	x
Mobile app INTERAXO onSite		x	x
Records filing		x	x
Notification rules			x
Approval processes			x
Drawing handling with publishing and revisioning			x

1.2.1 Simple folder

These folders are like Windows Explorer folders. The main difference from and advantage over Windows Explorer folders is that Interaxo folders can be shared with all project team members and have version tracking for the files.

In a simple folder, you can:

- Add files
- Create simple folders
- Create active folders with or without a workflow

Tip: If you use Chrome, you can copy one entire folder structure from Windows Explorer into Interaxo.

1.2.2 Active folder

This folder type makes it possible to add additional data and information to the files, known as an entry. We recommend using active folders to ensure a good structure and retrieval of files. You can sort, group, filter and search for metadata related to your files. You can also gather several files which belong together in the same entry. In an active folder, you can:

- Create entries with attached files
- Add comments to entries
- Action logs, distribute logs about, e.g., who edited or deleted a file etc.

You should use an active folder for, for example, drawings which contain data such as drawing number, type, title and revision number.

1.2.3 Active folder with a workflow

Blue folder with arrows. The active folder with a workflow works in the same way as an active folder. The difference is that this folder type also supports a workflow process. Examples of when an active folder with a workflow can be useful:

- Approving drawings
- Deviations
- Change orders
- Case clarifications
- Attesting travel expenses
- Contract approval

In an active folder with a workflow, there are steps which describe the process that the entries/files are undergoing.

1.2.4 BIM folder

BIM folders are available in Interaxo Pro
This folder type is used for storing BIM files (.ifc). It includes a viewer for IFC.

1.3 Accept invitation

If you are invited to a room, you will receive an invitation by email. Accept the invitation to obtain access to the room. The invitation (email) will show:

- which room you are invited to
- who invited you
- your user name
- the role you have been assigned in the room (observer, participant or administrator)

Click on the link provided in the email and follow the instructions.

If this is your first time using Interaxo you will need to:

- Enter your first and last name.
- Select a personal password.

NB Password must contain at least eight characters, consisting of numbers and both upper and lower-case letters.

- Accept the user terms and click on the 'OK' button.

Your user has now been created and you may log in.

If you are already a member of one or more rooms, you will have access to the new room immediately by following the link in the email. If you have been invited to a room you will receive an invitation by email. Follow the instructions in the email to access the room.

1.4 My profile

To find 'My profile', click on the round icon in the top right corner of the page. Here you can edit your profile and change your password for INTERAXO. You can also get an overview of all your subscriptions (in all rooms) and log out of Interaxo

In the 'My profile' dialog box you will find the following tabs:

Personal information

To change the information in the 'Personal information' tab, click inside the frame.

- Add the information about yourself and change the language if necessary.
- Upload a picture: click on the profile icon in the top left corner inside the dialog box to add a picture.

Rooms

By clicking on the 'Rooms' tab, you will get an overview of all rooms of which you are a member as well as which user rights you hold in these rooms.

Settings

Under the 'Settings - Notification settings' tab, you can choose whether you would like to receive project activity reports.

Changes in language will be applied when you click on the **F5** button on the keyboard (updates the page). Sometimes it is necessary to log out and in again. *Remember to save.*

Subscriptions

Under the 'Subscriptions' tab, you have access to all the content to which you have subscribed. You get a complete overview of all content in any room of which you are a member. If you wish to unsubscribe from a specific item (folder, entry or file), click on the item (name). This will take you to the item you subscribe to, then just click on 'Unsubscribe' at the top of the page under the turquoise banner.

Tip: If all members update and fill in their information in 'My profile', the member list (under the 'Members' tab inside Interaxo) can be used as a contact list for the project. If you are a member of several projects, you only need to fill in this information once.

1.5 Change language

If you want to change the language, do as follows:

- Click on your name in the top right corner.
- Choose 'My profile'.
- Under 'Personal information' choose desired language in the drop-down list.

Remember to save your change(s).

1.6 Change password

NB *Password must contain a mix of upper and lower-case letters and have a minimum of eight characters.*

You can change your password in two ways.

1. **When you are logged in to Interaxo:**

   - Click on the head icon (picture icon) in the top right corner ('My profile'). Choose 'Change password'.
   - Fill in your current password, then type your new password twice in the appropriate edit boxes. Click on 'OK'.

2. **If you have forgotten your password and are unable to log in:**
   - Go to the Interaxo login page.
   - Click on 'Forgot password?'
   - Enter your email address.
   - Click on the link in the email you received and follow the instructions in the email. Change the password when logged in.

2 SIMPLE FOLDER

2.1 Document files

Document files can be uploaded and downloaded to and from Interaxo either in simple folders or as attachments to entries in active folders. You can upload all file types, and the integrated viewer can read the most common file formats.

Managing files:

Upload	Upload one or more file(s) from your computer/server.
Add a new version	Add a new file version.
Edit	The file will be downloaded to your PC. If the file is a Microsoft Office file, you can edit it online from Interaxo. The file will be locked. An updated version of the file will be uploaded at the end. You can also cancel the editing.
Cancel edit	Cancels editing and the file lock disappears.
Activities	To the right of the folder content, you can see activities for the specific folder/file. You can also see this when a file has been opened in the document viewer. Click on the icon (shown by an 'i') above to show/hide activities (and comments).
Comments	To the right of the folder content, you can see comments for the specific folder/file. You can also see this when a file has been opened in the document viewer. Click on the icon (shown by an 'i') above to show/hide comments (and activities).
Move to...	Moves the file to another location.
Copy to...	Copies the file to another location.
Copy	Copies the file to paste it in another location.
Cut	Cuts the file to paste it in another location.
Paste	Pastes the file (from 'Copy' or 'Cut').
Delete	Deletes the file(s).
Download	Downloads the file(s). **NB!** If more than one file is downloaded, a zip file of the downloaded files is created.
Share	Shares the file in an email with the recipients you add.
Subscribe	When you subscribe to a file, you automatically get a notification when the file has been changed.
View	The files will open in the integrated viewer.
View in new tab	The file will open in the integrated viewer in a new tab.
Rename	Right click on the file and chose change name.
Access rights	This will open the access rights settings and you can change the settings for the file.
Add to order	The file will be placed in the shopping trolley (applies to Interaxo Pro).
Archiving	Files in entries can be archived (filed) if this functionality has been turned on (applies to Interaxo Pro).

2.1.1 Add files by clicking on the 'New' button
- Open a simple folder or right click on a folder in the folder structure.
- Click on the 'New' button or right click and chose 'File upload', alternatively 'File from template'.
- Choose one or more files (press down Shift or Ctrl to choose multiple files).

- Click on the 'Open' button.

2.1.2 Add files with drag and drop
- Open the folder to which you want to upload your files.
- Open Windows Explorer on your computer, locate the files you want to upload and drag them over by holding the mouse down until you finish.

2.2 Add file from document template

You can add a file from a document template in simple and active folders.

1. Click on the 'New...' button.
2. Chose 'File' from template.
3. A dialog box will be shown with all the available template files in the current project room. There may be one or more files in a folder or sub-folder.
4. Choose your preferred template file and click on it.
5. You can rename the new file if you want.
6. You can see a preview of the file on the right in the dialog box.
7. Click on 'OK'.

Administrators can add files from the template to the room.

2.3 Links

You can use both external links and internal Interaxo links.

Examples of Interaxo internal links:

- Folders
- Steps in active folders
- Entries
- Files – also inside entries

2.3.1 Add an Interaxo internal link

You can add an internal link in two ways. A link is shown by a link symbol on top of the icon of the linked object (e.g. a folder, entry or file).

Option 1
- Click on 'New' and choose 'Link'.
- Choose 'Interaxo link' and whether it should open in the same tab or in a new tab in your browser.
- Choose which room and which folder, entry or file you want to link.
- The name of the object will be copied into the name field of the link. The name of the link can be changed.

Option 2
- Select one or more objects in a folder.
- Right click and choose 'Copy'.
- Enter the folder or entry you want to copy the objects to and click on 'Paste as link'. Alternately, you can right click and choose 'Paste as link.

If the source object (the object the link refers to) is deleted, a grey icon will appear.

2.3.2 Add an external link

Links to other web pages can also be created as links in Interaxo. External links are symbolized by a globe icon.

- Click on 'New' and choose 'Link'.
- Choose 'External link' and whether it should open in the same tab or a new tab in your browser.
- When the page has been filled in, the last part will automatically be copied into the name field of a link (after the last '/' in the web address). The name of the link can be changed.

2.3.3 To work with links

- Click on the link.
- By clicking on the link, you will be redirected. The new address will be opened either in the same tab or a new tab in your browser.

This is what you can do with links:

|	
Move to...	Moves the link to another location
Copy to...	Copies the link to another location
Copy	Copies the link to paste it in another location
Cut	Cut the link to paste it in another location
Paste as link	Pastes the link (from 'Copy' or 'Cut')
Delete	Deletes the link(s)
Download	Downloads the object the link points to
Share	Shares the object the link points to in an email with the recipients you add
View	Directs you to the place the link points to
View in a new tab	Directs you to the place the link points to (opens in a new tab)
Rename	Opens the 'Edit link'. The name and the path to the linked object can be changed.
Settings	Opens the 'Edit link'. The name and the path to the linked object can be changed.
Add to order	The file the link points to will be placed in the shopping trolley (applies to Interaxo Pro).
Archiving	The links can be filed if this functionality has been turned on (applies to Interaxo Pro).

2.4 File versioning

2.4.1 Add a new version to a file

There are several ways to add a new version of a file. We have chosen to include them all in this document.

1. Select a file or right click and select 'Add new version'. Get the file you want to add from Windows Explorer. Add a version comment. Click on 'OK'.
2. Drag and drop a file with the same filename in the same folder. You will be asked whether you want to add a new version or a copy of the existing file. (You can rename the file copy later if you chose this option to create a completely new file.)

2.4.2 Work with file versions

- Click on the versioning icon for the actual file.
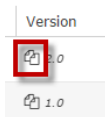
- You may also look at the file with the document viewer in Interaxo. In the top menu, you can click on 'Version history'.

Previous versions are now visible in the dialog box.

2.4.3 Access a previous version

- By clicking on 'Restore', the version will be restored and be added as the last version (the original version will be unchanged).
- Choose whether you want it to be added as a minor or a major version
- Please note that initial versions remain unchanged
- Click on 'Download' to get a previous version.

This also applies to files in entries in active folders. This is described in more detail in a separate section.

2.5 Download files

1. Select one or more files or simple folders.
2. Click on the 'Download' button, alternatively right click on the file/folder and chose 'Download'.

If you download one file, it will be downloaded as it appears in Interaxo (same format).

If you chose to download multiple files, a zip file will automatically be created. This is a compressed file to save space. You can either save this file on your PC or open it, depending on your browser.

NB Zipped files must be extracted before they can be edited. Click on 'Extract' in Windows Explorer to extract the files. Then you chose where to save the files. Select the required files and/or folders.

2.6 Copy and move

You can move or copy files between folder within the same project room. You can also move or copy between folders and entries or between entries i one or several project rooms within the same community.

2.6.1 Move or copy files to...

1. Mark one or several files in a folder
2. Right click and chose Move to... or Copy to...
3. A dialog box appears and you can choose which folder you want to move or copy to

2.6.2 Copy/cut/paste files and entries

1. Mark one or several files or entries in a folder
2. Right click and chose Copy or Cut
3. You will now be automatically directed to the location you are pasting the file or entry
4. Chose Paste.
5. The file(s) which has been copied or cut will be marked with a blue background while the copying is in process.

2.6.3 Drag and drop

Drag and drop one or several files in a folder will also work for move and copy. Press the Shift key down while using drag and drop.

1. Mark one or several files in a folder
2. Click on one of the chosen files and drag and drop into into designated folder

3 ACTIVE FOLDER

3.1 Entries

3.1.1 Entries and associated information

Entries are shown as table rows in an active folder. The entries contain data fields (metadata) which can be used to register specific information about the unique entry. These metadata fields represent the columns in the active folder.

3.1.2 Other content in entries

Files can be uploaded as attachments to an entry. Everyone who has access to an entry can add comments to the entry. All operations performed to an entry will be saved in a separate log.

3.1.3 Metadata fields

Metadata fields are unique to the specific folder, depending on the purpose. If the folder contains drawings, metadata fields for drawing number, title, building number, revision, discipline, etc. will be useful.

Entries can also describe tasks to be performed. Fields such as task description, due date, responsible and status will then be useful.

Metadata can be mandatory or optional.

3.1.4 Files

Files cannot be uploaded to an active folder directly, but must be added as an attachment to an existing entry in the folder. In practice, you will usually create a new entry, enter information into the metadata fields and upload files in one operation. Both attachments and information can also be changed or added later on.

The entries with attachment(s) are displayed with a paper clip in the folder overview. Click on the number of files to list all the attachments in the entry. Click on the file, click on 'View' or 'View in new tab' link to view the contents of a file. Click on the 'Download' link to save the file on your PC.

NB Some files are always downloaded even if you have selected preview.

3.1.5 Retrieval and overview

Active folders can contain many entries. To get a good overview of the information on entries and their content, there are powerful features for sorting, grouping and filtering rows in the folder.

3.1.6 To open an entry

Entries are created in active folders. Open the folder to list all the entries in the folder.

Click on the entry's entry title (it looks like a link) to see all the information about the entry (document). This may be a document title, drawing number, type of document or other fields.

3.2 Create an entry

1. Right-click on the specific folder and choose 'New entry' from the menu
2. Alternatively open the folder and click on the button **'New entry'**
3. Fill in the metadata

4. Add one or many files by clicking the button 'New**..'** and choose either **File upload** and **File from template**
5. Upload files by using Windows Explorer
6. Click the button 'Create' to add the entry into the folder

3.3   Add file(s)

You can read more about files in Interaxo in the section 'Simple folder'.

3.3.1   Add file(s) by clicking on the 'New…' button
1. Open an entry in an active folder or right click on an entry in the active folder.
2. Click on the 'New' button and select 'File upload', alternatively right click and select 'New' and 'File upload'.
3. Select one or more files (hold down 'Shift' or 'Ctrl' to select multiple files).
4. Click on 'Open'.
5. The files end up in the attachments area in the current entry.

3.3.2   Add file(s) using drag and drop

1. Open the entry (in the active folder to which you want to upload files).
2. Open Windows Explorer, locate the files you want to add to the entry, select the file(s) and drag it/them to the entry's attachment area.

3.3.3   File from template

If there are template files in the room, you can use them. You will find them here and can choose any of them to create a new file. Once you have chosen a template file you can rename it before the file is created in the current folder. You will also see a preview of the file here.

NB *If the rules for file naming are enabled in the folder, the names of the files you upload will be changed per the rules set in the folder.*

3.3.4   Add file(s) to an existing entry
Files can be added to an entry later.

1. Right click the entry and select 'New...'. Alternatively, choose the entry by clicking in the checkbox, and the 'New...' button.
2. Select either 'File upload' or 'File from template'.

NB *If the rules for file naming are enabled in the folder, the names of the files you upload will be changed according to the rules set in the folder.*

3.4 Edit entries

3.4.1 Inline edit (instant editing of fields)

You can also edit content directly in the list view. You edit the entries one by one.
1. Double-click inside the cell you want to edit
2. If the field is a choice list, the options are shown in the dropdown list and if the field is plain text, please add your changes.
3. Add or change the information to the field.
4. Click outside the cell to save and finish the editing or press the tab button to save and go to the next editable cell.
5. If you want to cancel your edit, click the Esc button on your keyboard
6. Mass update

3.4.2 Mass edit

You can for instance use the filter function first to select your entries or simply select by clicking in the box in front of each entry. All fields except auto numbers and rich text can be edited.

1. Select the entries you want to edit
2. Click on the column heading (ie the field name)
3. Choose "Change selected entries"
4. Add your input
5. Click the OK button
6. All fields in the selected entries are updated with the input content

3.5 Import entries and files

Batch import of files is accessible from Interaxo Pro'.

The functionality to import files into an active folder with or without a workflow can either be used to import files to specific entries or to import files at the same time as creating new entries.

Create an Excel file with the same column layout as in the active folder. The fields in the active folder must be in the same order as the columns in Excel. The names of the columns, however, do not have to be identical to the field names. All the mandatory fields in Interaxo must be filled out, otherwise those specific, incomplete entries will not be imported.

Fill in the Excel file with all the data to be imported. Each row in Excel will become an entry in the active folder.

3.5.1 Importing entries

1. Highlight the relevant rows and cells in Excel. **NB Do not include the row of any column headings.**
2. Click on CTRL+C (copy) in Excel to copy the cells into Interaxo
3. Right click the active folder and select 'Import> Entries'.
4. The 'Import' window will open.
5. Click on CTRL+V (paste) in the empty space below the column headings (field names) of the dialog box.
6. Make sure all the content is correct. Correct any errors. If there are many inconsistencies, it is recommended that you cancel the import procedure and go back to Excel to correct the data before importing. You can continue with the import if the data are accepted and choose to fix the data later using Excel again. *See section '3.3.3 Update existing entries'.*
7. Click on the 'Import' button.

8. All information that is mandatory must be completed. If there are errors or anything is missing, you will see a red frame around the current field and can change the value(s). There may be drop-down lists in which you can select a value, or texts, dates or numbers to fill in.
9. In front of each row in the import window there is a small icon:

Red: something is wrong and must be corrected.
Blue: a new entry will be created.
Green: the entry already exists in the active folder and it will be updated.

Yellow: the entry already exists and will be updated with a new revision (the revision number and revision date will be changed).

The entries have now been created and you can add or import files to the entries.

3.5.2 Importing files

For users with Interaxo Pro

1. Right click on the active folder and select 'Import - files'
2. Make sure the filename is matched to the correct field in Interaxo. We recommend that this is a unique field such as, e.g., a drawing number (for an active folder with drawings). The field value must be the same as the filename (except the extension). It is possible to set a rule where this field matches only the first part of the filename. This is known as a partial match on filename and is discussed further down.
3. Click on 'Add file' and select the files you want to import from your Windows Explorer.
4. When the files have been added to the list, verify that all the information (metadata) in the columns is correct.
5. You can also use a rule for matching the filenames: 'Partial match on filename'. Example: The file 'A-40.1-113_revA-pdf' imported to the field drawing number 'A-40.1-113'. The system does not consider what comes after the '_' in this example.
6. **NB** When using a partial match, you will need to choose this setting – BEFORE you click on the 'Add file' button!
7. If you select a file that does not already have an existing entry in the active folder, a new entry will be created for this field. Remember to enter the correct information for the file.
8. Finally click on the 'Import' button. If you do not have the button 'Import' available, you must select one entry at the time and then click the button 'Add file' and choose files from Windows

3.5.3 Update existing entries

TIP: To batch edit multiple entries that are already in the active folder, you can export them to Excel first and make all the changes there. Then import the entries back into Interaxo. They will then be updated with the latest information.

1. Choose 'Import - Entries' after making the changes in Excel.
2. Make sure you have checked 'Update existing entries'.
3. Then select the field to be matched. This is usually the entry title field.
4. Retrieve data from Excel using 'Ctrl+C' (in Excel) and 'Ctrl+V') as described earlier in this document. The entries that have been changed will now be updated in this active folder.
5. Click on 'Import'.
6. All entries that are now in the list in the import window will be imported (regardless of whether there is a check in front of the entry).

3.6 Add a link

See section for simple folder: 'Links'.

3.7 Add a new file version

See section for simple folder: 'File versioning'

3.8 Add and change comments

All participants can add comments to entries. You can remove or modify comments that you add. *Observers cannot create comments.*

- Right click on the entry in the active folder and select 'Add comment' or open the entry and start typing in the box for 'Comments' in the top right corner.
- When you have finished, click on the 'Save' button.
- Change or delete the comment by clicking on the icons by the comment.

Every change and, optionally, deletion of comments will be logged.

You can see a quick overview of the comments for an entry by clicking on the number in the column represented by a speech bubble in the active folder.

3.9 Download (export)

3.9.1 Download files from an active folder

1. Select one or more entries in an active folder. Click on the 'Export' button in the top right corner.
   If no entries in the folder are selected, all the entries (files) of that folder will be exported.
2. Choose to export 'Files'**.**
3. Choose whether to 'Maintain the folder structure'.
   If you choose to maintain the folder structure, one folder per entry will be created, and the file(s) for each entry will be exported to the folders to which they belong. This can be useful if you have multiple files in each entry. If you have one file per entry (for example one drawing file), it may be better to choose not to maintain the folder structure. All the files will then be exported to one single folder.
4. Finally click on 'OK'**.**

3.9.2 Download the information on one or more entries (metadata)

1. Select one or more entries in an active folder. Click on the 'Export' button in the top right corner.
2. If no entries in the folder have been selected, all entries will be exported.
3. Choose to export 'Entries' (=metadata).
4. Choose format for the export: Excel (.csv) or pdf.
5. Depending on the format you choose, you will get different options:

   Excel (.csv)
   - All columns or only those visible in the folder
   - Choose whether to export associated files
   - Retain the structure (see the section 'Download files from an active folder' above)

   PDF
   - A PDF file with all entries or one PDF file per entry
   - Export associated files
   - Export associated metadata as a .csv file (Excel)

6. Finally click on 'OK'

You can perform an export from within an entry in the same way:

1. Choose which room you want to copy the files to in Interaxo
2. Click on the folder you want to copy the files to in the selected room.
3. Click on the 'Export' button.

3.9.3 Download file(s) from one entry

Open the entry in the active folder. Mark the file/files to be downloaded. Then click the 'Download' button. If you download more than one file this will automatically become a .zip file which you later can unpack on your computer.

3.9.4 Exporting files from one active folder to another

1. Repeat steps 1-4 from section 3.6.2
2. Click the 'Save in Interaxo' button if you want to copy files to a folder in the same room or to a folder in another room
3. Choose which room you want to copy files to in Interaxo
4. Click the folder you want to copy the files to the selected room
5. Click the Export button

3.9.5 Exporting files from one active folder to another

1. Repeat steps 1-4 from section 3.6.2
2. Click the 'Save in Interaxo' button if you want to copy files to a folder in the same room or to a folder in another room
3. Choose which room you want to copy files to in Interaxo
4. Click the folder you want to copy the files to the selected room
5. Click the 'Export' button

3.10 Move and copy entries

You can move or copy entries from one active folder to another, either in the same room or another. This also applies to entries in active folders with a workflow.

3.10.1 How to move or copy entries

Perform the following steps to move or copy entries between active folders:

- Open the active folder that contains the required entries.
- Select the entries you want to move or copy.
- Select 'More options> Copy' to copy the selected entries
  (or right click an entry and select 'Copy' from the right click menu).
- Click on 'More Options> Cut' to move the selected entries
  (or right click an entry and select 'Cut' from the right click menu).
- Open the folder you want to move or copy entries to.
- Click on the 'Paste' button
  (or right click the folder you want to move or copy entries to, and choose 'Paste' from the menu).

3.10.2 Which information is moved and copied?

When moving the entries, the following information is included:

- All fields and their values that match the corresponding fields in the destination folder
- All comments

- All attachments
- In addition, the folder from which the entry was moved is logged

When copying the entries, the following information is copied to the new entry:

- All fields and their values that match the corresponding fields in the destination folder
- In addition, the folder from which the entry was moved is logged
- All attachments
- Note that the original logs and comments on the entries are NOT copied

NB:

If the field definitions in the folders don't match, you will get a warning and can then choose whether to continue or cancel the operation.

You will see a list of the fields that don't correspond between the folder you move or copy from and the destination folder. If there are mandatory fields in the destination folder that don't have values in the source folder, these fields will also be listed.

3.11 Logging

All changes in entries in active folders are logged: by whom and when an entry is created, by whom and when files are added, as well as all other changes.

The following changes will be logged:

- Creation, modification and deletion of files
- Modification and deletion of metadata
- Removal of an entry
- Creating, changing and deleting comments
- Sharing of the entry

3.12 Move entries from one step to another in workflow folder

Adding and changing data (files and information/metadata) works in the same way in active folders with a workflow as in active folders without a workflow. See specific section for this.

Below is a description of the workflow process and how to move entries between the different steps of the workflow.

- Choose which entry or entries you want to move (check the checkbox in front of the entries).
- Click on 'Move to...'.
- Select the step you want to move the entries to.
- **NB.** You can only move to steps to which you have access.
- Click on 'OK' to move the entry.

TIP: It is also possible to use drag and drop to move entries from one step to another in the workflow folder. Choose one or more entries and drag them towards the step box you want to move them to. Drop them in that step box.

4 VIEW AND EDIT DOCUMENTS

4.1 View documents

### 4.1.1 Interaxos integrated viewer

Interaxo's integrated viewer works for images, PDF and MS Office documents. The viewer can also display technical files / documents like DWG, DXF and CAL. These file types are displayed in a printable format.

- When you click a file in a folder, the file opens automatically and is previewed in the integrated viewer. However, if you select the file and click the **View** button, the preview will open in fullscreen mode.
- If you select and chose **Open in Advanced Viewer**, the file will open in advanced viewer instead. This viewer contains several features that allow you to draw and comment directly in the file (see section 1.1.2 Interaxo Advanced Viewer).
- If you select multiple files and click View, you can scroll back and forth between the files in fullscreen mode.

Inside the viewer you can choose from several different options:

- See the file name
- Download the file
- View the file in fullscreen mode
- Open the file in Advanced Viewer

For PDF files, Word files and other documents, you can also zoom, print, search and choose to preview all pages if it is a multi-page document.
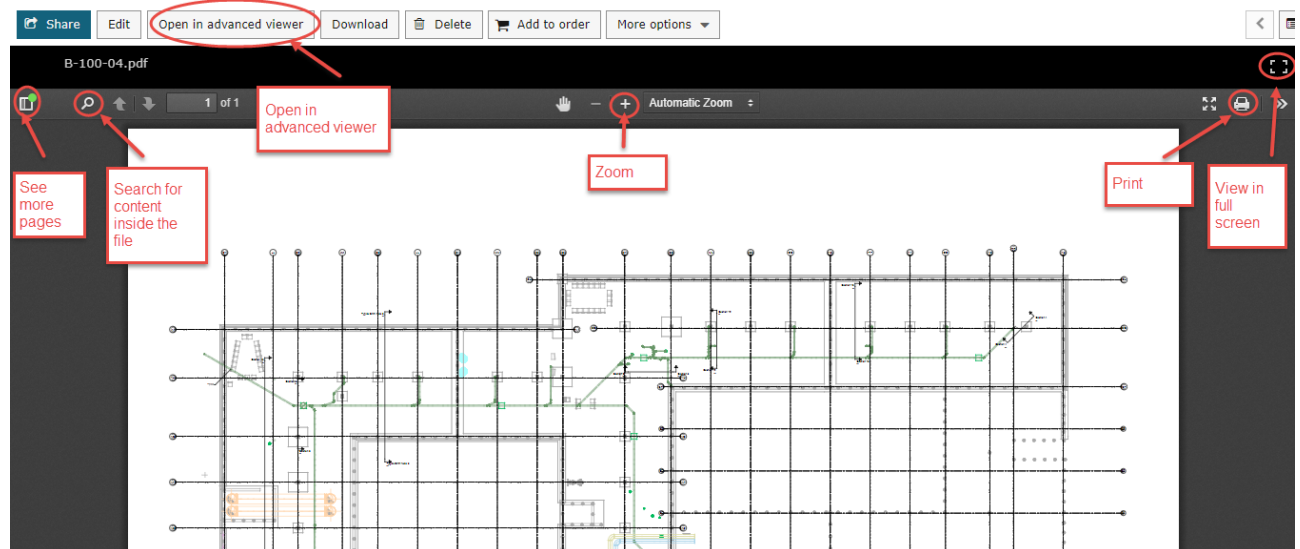
4.1.2 Advanced viewer

Interaxo's advanced viewer works for most common file formats. Select the file and press the 'Open in Advanced Viewer' button.
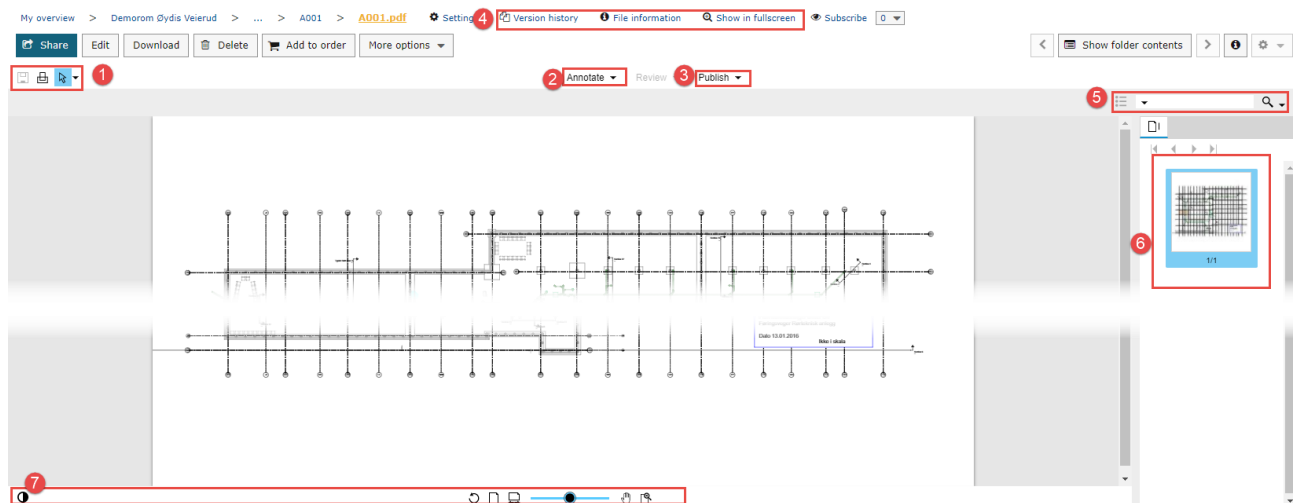
Interaxo's advanced viewer can be used for most common file formats. Select the file you want to view and click on the 'View' button on the toolbar.

Functionality in the Interaxo's viewer:

1. **Save** (when you've made 'annotations' or editing marks and control points)
   Print (to your regular printer)
   Select button (pointer or mark a 'region')

2. **Annotate** (type text and add revision clouds, editing marks [change marks], control points [check view], etc.)
   When you use annotations, the name of the saved annotation will show as a new comment (e.g. in the entry overview or folder overview). These annotations (comments) are also searchable.

3. **Review** (handle the editing marks and control points)
   Publish (publish the document with or without annotations/reviews to TIFF or PDF

4. **Version history**
   File information
   View full screen

5. **Search** – in the document (with option of advanced search)
6. **Displays** all the pages – you can scroll through them here
   Display setting for the viewer (e.g. monochrome or standard)
7. **Rotate** image/page
   Adjust the window to the size of the document
   Customize the window to the width of the document
   Zoom controls
   Pan
   Zoom window

4.2 Online editing of Office documents

There is no need for a plug-in to edit an MS Office document, but you must have the appropriate permissions for the document to edit it. Anyone who uploads a document automatically becomes the owner of that document and therefore has the right to edit, move, and delete it. This person can also determine who else should have permission to manage the document.

4.2.1 How to edit an Office document

1. Select the document you want to edit.
2. Click on 'Edit' in the toolbar or right click on the file and select 'Edit'.
3. The file will then have an icon in front of the filename in the folder. The icon looks like a piece of paper with a pen for you and as a padlock for others. This indicates that the document is being edited.
4. The file is then opened in MS Office (Word, Excel or PowerPoint).
5. Make any changes you want in the document.
6. Save and close the file (X).
7. You are then asked if you want to check in the document. Answer 'Yes'. This creates a latest version of the file.
8. Enter any comments about the change in the document in the box for version comments. If you want to keep the document checked out for further editing, uncheck the box for this.
9. Remember to refresh the page in INTERAXO after you have checked in the document. You can do this by clicking on the refresh icon at the bottom right of the page. You can also choose to use the browser function to refresh the web page.

NB *This may look a little different in different browsers.*

If you forget to check in the document and you are no longer logged in to Interaxo, you will receive a message saying that you must log in again to update the changes to the document. Log in to Interaxo in the usual manner.

4.2.2 Editing Office documents in Chrome

Chrome supports editing of Office documents created in Office 2010, Service Pack 2 or newer.

The first time you open an Office document, you will be asked to allow Chrome to open an external application – in this case, for example, MS Word. To use the online editing, you must accept this in Chrome, which you do by clicking on the 'Launch application' button.

To avoid having to repeat this every time, we recommend that you check the 'Remember settings' checkbox. This must be done for Excel, Word and PowerPoint, as these are three separate programs.

If you get a warning about unsafe content when you start MS Office, you must add the domain Interaxo as a 'trusted location'. This is done under 'Internet settings' on your computer.

Windows 7 users can either follow the instructions from Microsoft or contact our support.

5 FIND WHAT YOU ARE LOOKING FOR

5.1 Last activities in a room

When you are in a room in Interaxo, you will find a tab called 'Last activities' in the left-hand menu. In this tab, you will get an overview of the latest activities in the room. You can choose to display the last 24 hours, 7 or 30 days, or since you were last logged in.

The activities that are logged include:

- Creating or updating folders
- Uploading files and file versions
- Creating and updating/editing entries
- Moving and deleting files, entries and folders
- Comments on entries
- Fields in entries: new, changed and deleted

5.2 Explore Interaxo

Navigate in the same way as in Windows Explorer: click in the folder structure on the left or on the folders in the listing on the right.

It is also possible to fast-scroll through the paths by clicking on the required folder in the path above the document listing.

My overview > Manhattan Public School > 01 Project administration > 01.07 Pictures > **Construction project 01.png**   ⚙ Settings
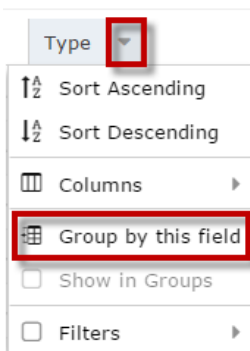
Inside an entry or folder, you can also navigate between the entries or the files without first having to go to the list view. Click on the arrows at the top of the entry or viewer. You can also click on the 'View all entries' or **'**Show folder contents' buttons to return to the list view.

< 🖽 View all entries >   OR   < 🖽 Show folder contents >

5.3 Group and sort

5.3.1 Group

In a folder (simple or active or in the attachment area of the entries), you can click on the small arrow to the right of the field you want to group by.

Type ▼

- ↑²ₐ Sort Ascending
- ↓²ₐ Sort Descending
- ▥ Columns ▸
- ▦ Group by this field
- ☐ Show in Groups
- ☐ Filters ▸

Turn off grouping by unchecking the 'Show in Groups' checkbox**.**

5.3.2 Sort

To sort values in a column by its content, click on the small arrow to the right of the field you want to sort by. You can select to sort in ascending or descending order.
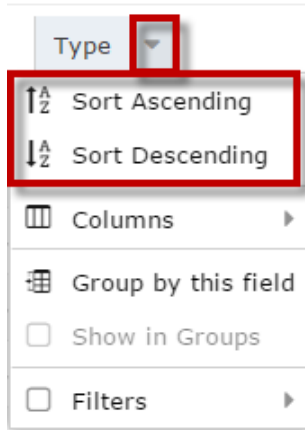
5.3.3 Filter

Filtering can be used in both simple and active folders (with and without a workflow and also in the attachment area of the entries).
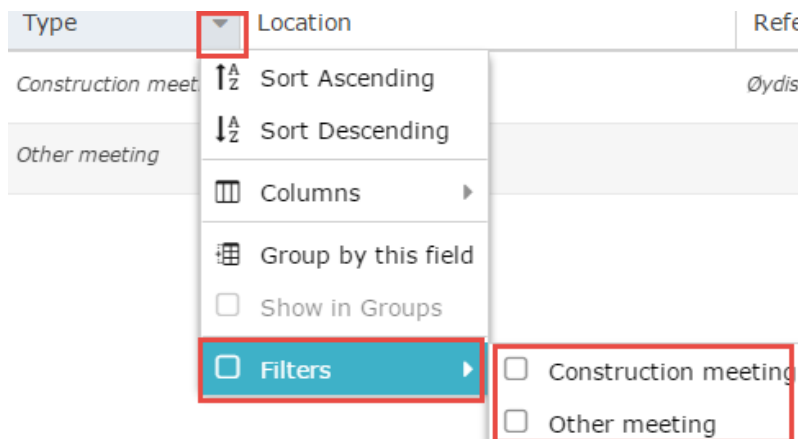
Once you have chosen a filter for one or more fields, a red filter icon appears at the top of the field or fields (columns) where filtering is used.

There are several ways to reset or turn off filtering:

- There is a 'Reset filter' button in the bottom right corner of the web page.
- Uncheck the checkbox for the filter(s) you want to turn off by clicking on the column header.
- Click on the gear icon above the list of entries or files and choose 'Clear filters'.

There are several different kinds of filters.

Text filter

Text filters can be used in several ways in both simple folders and the list of attachments inside the entries. Here are some examples:

- For files:
  - Filenames/parts of filenames (e.g. 'plan')
  - File extension (e.g. 'pdf')
- All or parts of word (e.g. 'Control')

Number filter

- Greater than, Less than or Equal

Can be used for file size or number of fields in active folders, *e.g. View files larger than 2 MB.*

Member filter

E.g. View entries for which Peter Project manager or Constantine Construction worker is set as responsible.

Date filter

8. Before, After and On

E.g. Show files that were modified on 24 June 2015.

List filter

E.g. View document of the meeting types "Planning Meeting" and "Workshop".

In 'Version history' in a simple folder or the attachments area of an entry, you can click on the icon for versions in the 'Version column'. You will then be able to see the full version history for that file. From here, you can download an earlier version of a file or restore a previous version. This will then automatically become the current version of the file.

5.5 Search

In the top right corner, you will find the search tool. Enter the text to search for.

If you get large numbers of search results, only the first 50 will be displayed. It may therefore be advisable to be more specific when searching. You can also try to reduce the number of folders or use the standard Windows search functionality (see below).

We have put together some tips to make it easier to find exactly what you are looking for.

One tip is to use filtering, grouping or sorting in the folders.

NB *Searches apply within a community.*

5.5.1 Searching for content in any room to which you have access in Interaxo
- Go to 'My rooms' (the overview of the rooms to which you have access in Interaxo.
- Type in the text string to search for in the search box in the top right corner.
- Click on the 'Search' button to search.

5.5.2 Searching for content in one specific room
- Go to the specific room (and folder) where you want to perform the search
- Enter the search text in the search field and click on the 'Search' button

5.5.3 Search results
The search results are displayed on a separate page. You can refine the search results by changing your search string and/or using the standard Windows search functionality. This is described further down.

If you want to expand the search results to multiple folders and/or rooms, click on the 'x' by the folder or room names that precede the search string.

Using special characters (wildcards) in the search string

Wildcards can be used to replace one or more arbitrary characters in the search string. By using wildcards, you get more search result simultaneously with similar names or text. You can also find what you are looking for even if you only remember part of a name or word.

Using '*' and '?' in the search box

A question mark (?) indicates an arbitrary character and a star/asterisk (*) represents any number of arbitrary characters. Below are some examples to explain this:

* – Truncation, e.g. 'plan*' searches anything that begins with plan: 'Plan 00', 'plan02', 'plan drawing', etc.

? – Any character in a given space in the search string, for example, 'room???' will find 'room002', 'room112', etc.

a* – match all files with names beginning with 'a'.

ab?.txt – match, for example, 'Abc.txt' and 'abd.txt' but not 'Abcd.txt'.

test. * – match all files that start with 'test' regardless of suffix, e.g. 'Test.txt' and 'test.dwg'.

Using AND, OR and NOT in your search string

When you specify multiple words as the search text, the search looks for content that contains at least one of the keywords. If you only want results that contain all the keywords you need to use AND between the words.

+, AND, & – both or all criteria must be met; typically restricts search results.

|, OR – at least one criterion must be met.

A few more examples:

'Old methods' is the same as 'old OR methods'**,** which matches anything that contains the word 'old' or 'methods' or both.

'Old AND methods' will only give results for content that contains both words.

If you get unwanted results, the word NOT may be used before the search text, possibly in combination with wildcards:

'ro* AND NOT routine' will match the word 'rock' but not 'routine'.

6 NOTIFICATIONS

6.1 Notification (night report)

Interaxo sends out a report by email every morning of all activities that have occurred in the past 24 hours in the rooms of which you are a member. The email will contain links to the activities that are new or modified.

6.1.1 Activities reported:

- New and updated folders
- New files and new file versions
- New and updated/modified entries
- Folders, files and entries that have been deleted or moved
- Comments made in entries
- New, changed and deleted fields in entries

You can also find information in the latest activities in a room by clicking on the tab 'Last activities' in the left-hand menu. Here you will find a summary of recent events that have occurred in that particular room. You can choose to see what has happened in the last 24 hours, the past 7 or 30 days, or what has happened since the last time you were logged in.

All new members have night reports set by default. If you want to turn this off, this is done under the 'My Profile – Settings'. Remember to save your changes.

Interaxo sends out a report by email every morning of all activities that have occurred in the past 24 hours in the rooms of which you are a member. The email contains links to the activities that are new or modified.

6.2 Share

You can easily inform other members of the project using the 'Share' button in Interaxo.

Go to the folder, file or link you want to share. Check more items if you want to share information about more than one, by clicking in the check box to the left of the item. Then click on 'Share' to share. A small separate window that looks like an email will open. Choose who to share with and enter your message. Sharing of entries is logged (time and recipient). The actual content of the message is not logged.

How to share content:
1. Choose items, click on 'Share'.
2. Choose recipients. You can select groups and individuals within the room. Be aware that only members who have read access or more to the items can be selected as recipients.
3. You can change the subject line if you want.
4. Write a message to the recipient(s).
5. Link(s) to the folder, entries or documents will automatically be attached inside the message.
6. You can choose whether you want a copy of the message sent to yourself. This can be useful as the actual content of the message will not be stored elsewhere in Interaxo.
7. Finally click on 'OK'.

6.3 Subscribe

You can subscribe to be notified of changes or new content in a room immediately when something happens.

Click on 'Subscribe' ☻ or right click on a folder, entry or file and select 'Subscribe'.

You will be notified by email as soon as something new happens in the place to which you have chosen to subscribe. Administrators in the room can see who and how many people subscribe to the various items by holding the mouse pointer over the number next 'Subscribe' ☻.

To unsubscribe, click on 'Unsubscribe' or 👁 again.

6.4 Notification rules in workflow folders

In workflow folders, rules can be set for who should receive information about activities, new entries or entries that are moved into specific steps.

The setting up of these rules is described in the administrator part of the help documentation.