

Client Sharefile Access

Executive Summary

In an effort to continually provide excellent service to our clients, ERSC is always seeking technological solutions to increase efficiencies to reduce cost and time impacts to projects. In improving ERSC's This document will outline access to the system, navigation of the system, obtaining information/documents, adding information/documents, and the ERSC transmittal process.

Please contact Cassandra Silva at csilva@erscinc.com for any issues/questions.

Contents

Executive Summary	1
Contents	1
A. Access	2
A.1 Initial Access	2
A.2 Regular Access.....	6
B. Navigation.....	8
B.1 Navigation Pane.....	8
B.2 Project Folder Navigation.....	9
C. Document Retrieval and Submittal	14
C.1 Document Retrieval.....	14
C.2 Document Submittal.....	16
D. Notifications.....	22
D.1 Upload Notifications	22



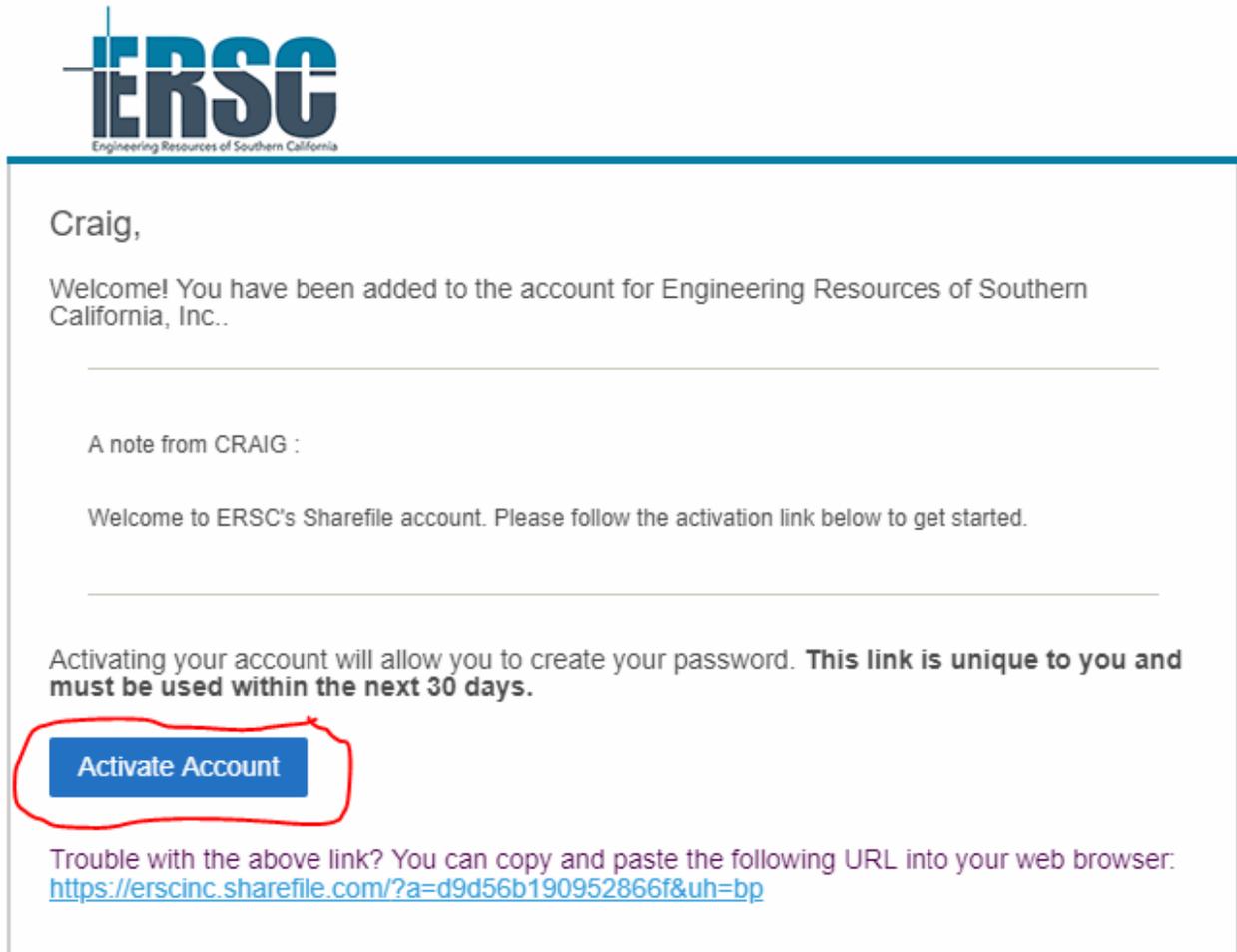
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BLANK

Client Sharefile Access

A. Access

A.1 Initial Access

When your organization is ready to begin using Sharefile, ERSC will setup an account for each person within your organization that requires access. When your account is initially created, you will receive an email from the Sharefile system with a link to access the system as shown below:



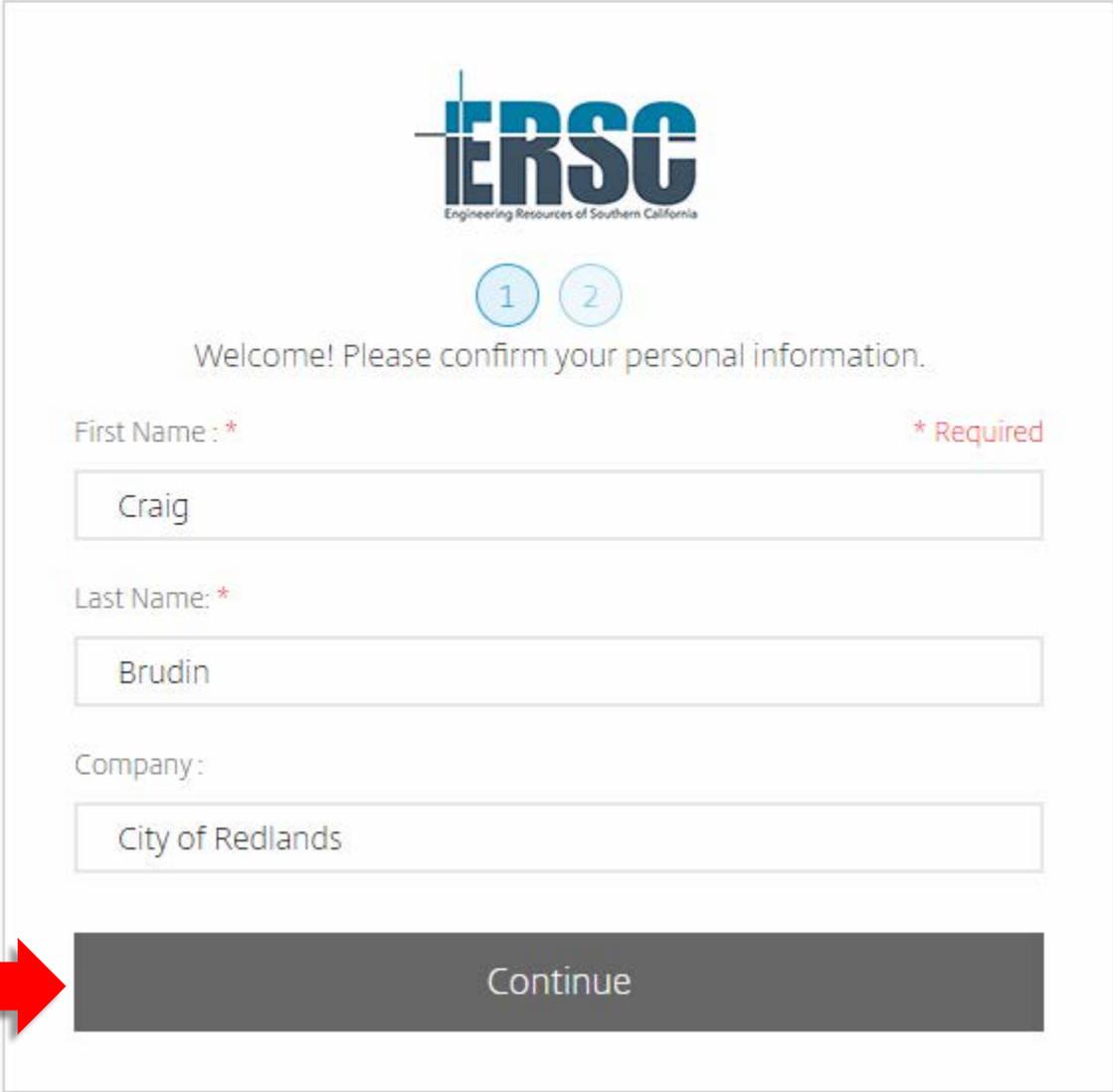
When you receive this message, you can click the “Activate Account” button or copy and paste the provided link into your internet browser.

Sharefile considers your email address to be your username since this information is delivered via email.

Completing this step will direct you to the login screen for the system.

Client Sharefile Access

After accessing the initial login page, the system will verify your information as shown below:



ERSC
Engineering Resources of Southern California

1 2

Welcome! Please confirm your personal information.

First Name: * * Required

Craig

Last Name: *

Brudin

Company:

City of Redlands

 Continue

If any of the information is incorrect, you may correct it here and the system will automatically update your profile. After verifying and changing any information that may be incorrect, click the “Continue” button as shown next to the red arrow above. Clicking continue will take you to the Password Creation page.

Client Sharefile Access

After verifying your information and clicking Continue, you will be directed to the Password Creation page as shown below:

ERSC
Engineering Resources of Southern California

✓ 2

Your username is **craigbrudin@gmail.com**.

Please create a password.

Please create a password that meets the following requirements:

- ✓ at least 1 Upper Case letter
- ✓ at least 1 Lower Case letter
- ✓ at least 1 number
- ✓ at least 8 characters in length
- ✓ Password and Confirm Password should match

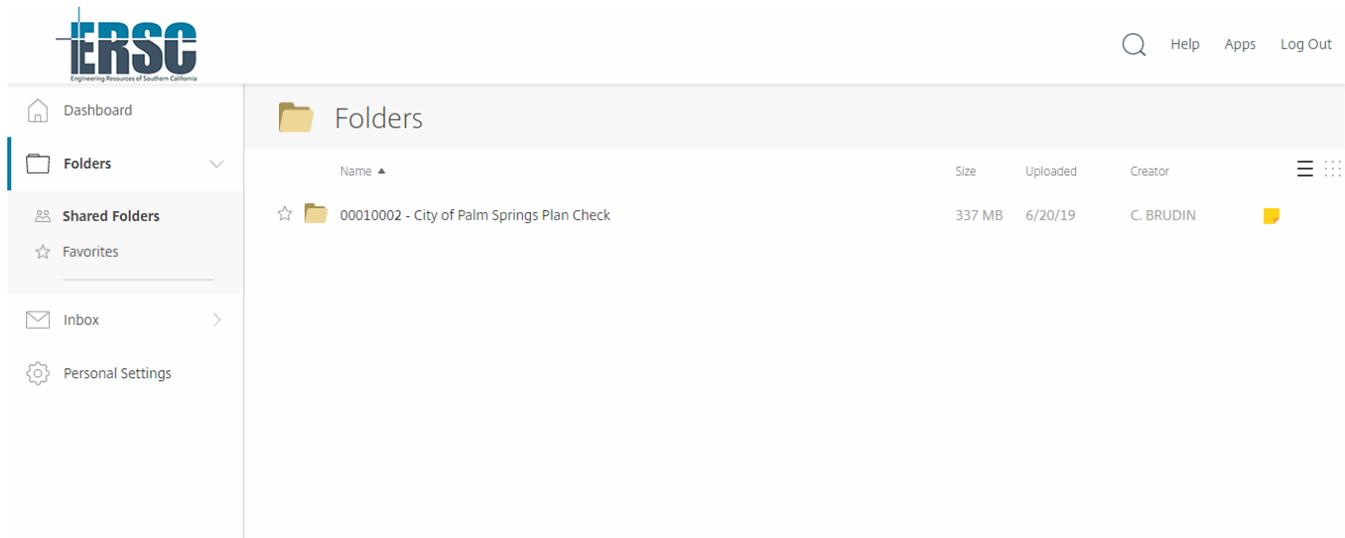
Password: Show Password

Confirm Password:

Here you will choose a password that will allow subsequent access. Enter your password choice in the first row next to the red arrow, and confirm your password in the second row next to the blue arrow. Your password will need to conform to the parameters outlined in the blue box next to the green arrow above. When you are finished and your password has been accepted (verified by the green check marks in the blue box), you can click the “Save and Sign In” Button. This will save your password and take you to the Sharefile default login page.

After completing a password and saving, you will be directed to the site as shown below:

Client Sharefile Access



We will cover navigation of the site in Section B.1.

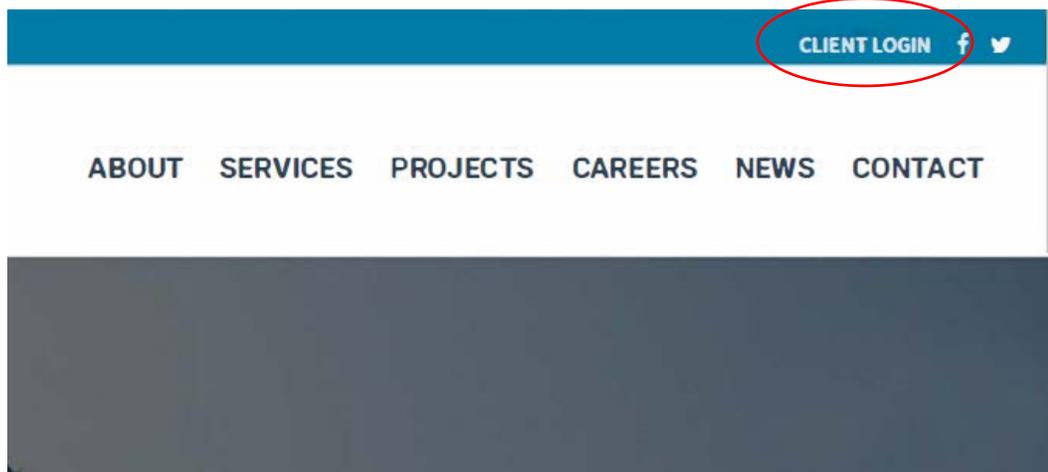
Next we will explore regular access to the site.

Client Sharefile Access

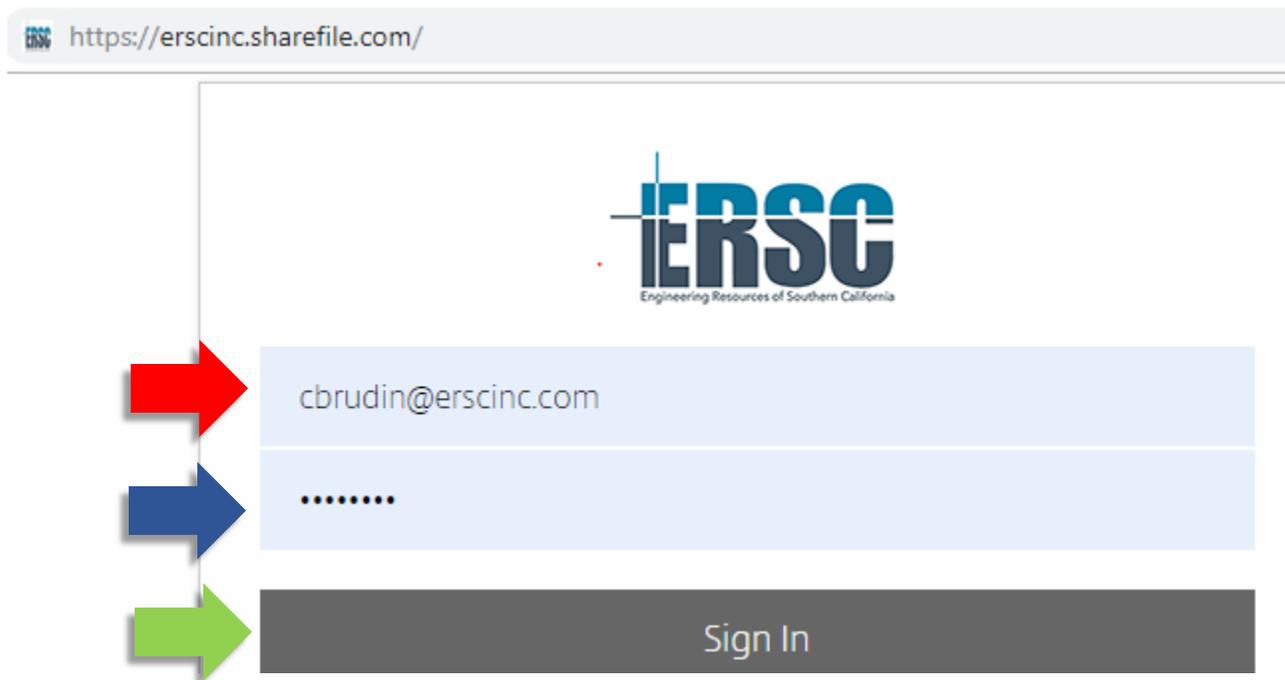
A.2 Regular Access

Following initial access, verification of profile, and password selection, access to the Sharefile system will be completed by accessing the web address: <https://erscinc.sharefile.com/>

Access is also available through ERSC's website by clicking the "Client Login" button at the top right corner of the home page. ERSC's website address is erscinc.com :



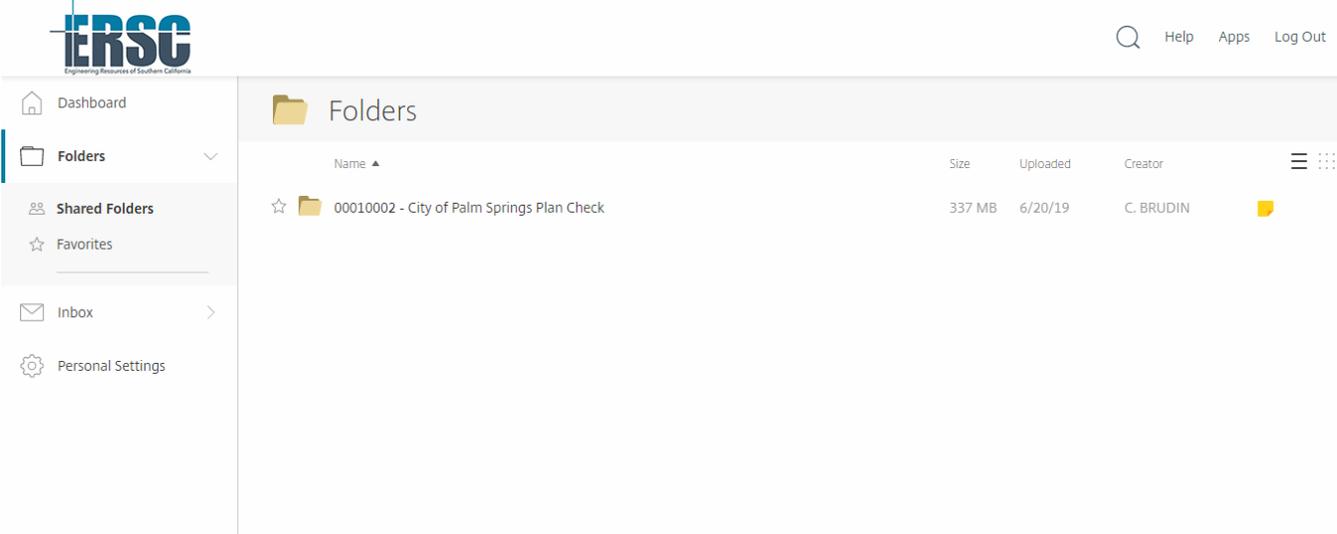
By entering this address into your internet browser, you will be directed to the login page as shown below:



Here you will enter your credentials for login. Enter your email used during your initial registration in the upper field next to the red arrow. Enter your password in the lower field next to the blue arrow. When your credentials are complete, click the "Sign In" button next to the green arrow.

Client Sharefile Access

After correctly entering your credentials and clicking Continue, you will be directed to the site as shown below:



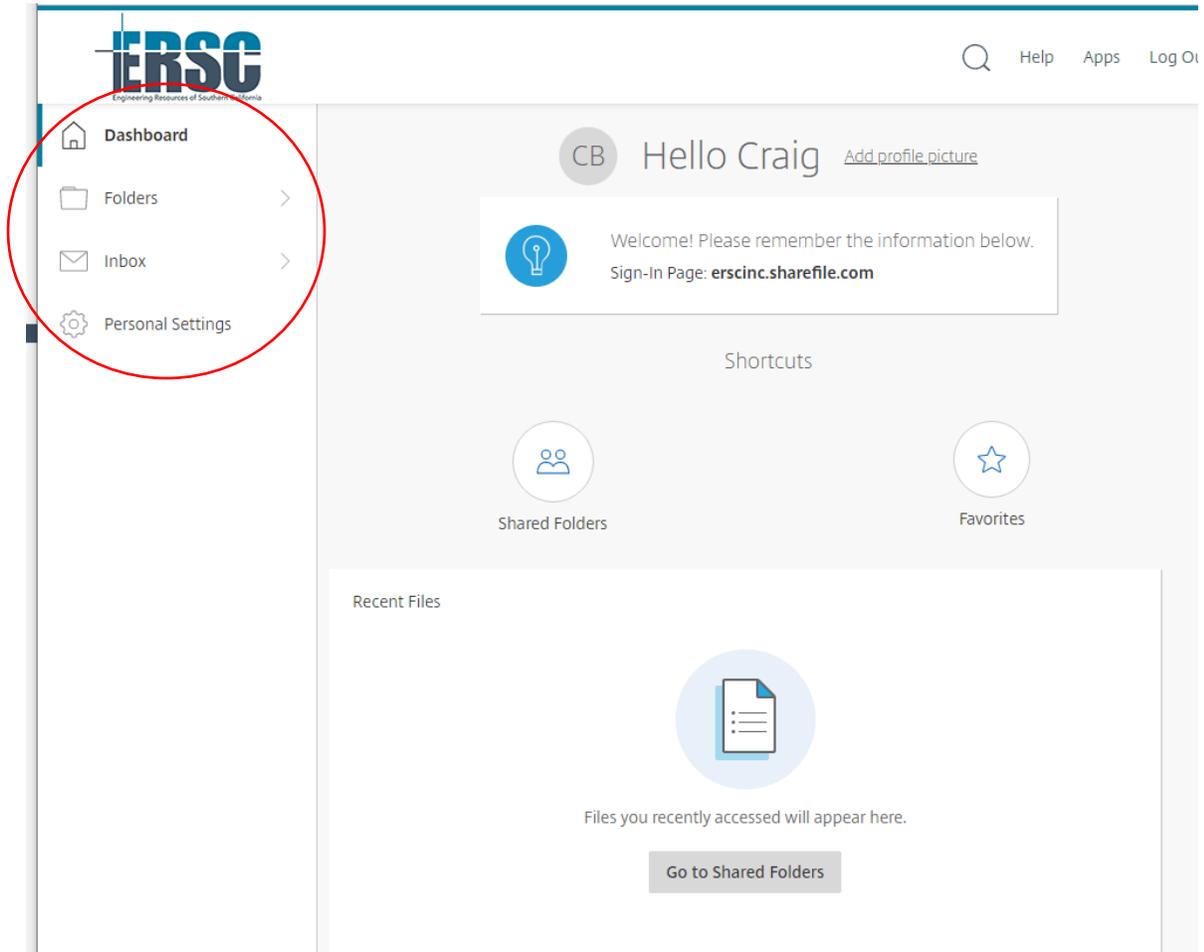
Next we will explore navigation of information.

Client Sharefile Access

B. Navigation

B.1 Navigation Pane

Upon Login you will be directed to the area of the site you had previously viewed upon you last login. Since you will most likely want to access different information upon each login, the navigation pane provides quick access to different areas of the site. The navigation pane is always visible on the left portion of your window as shown below:



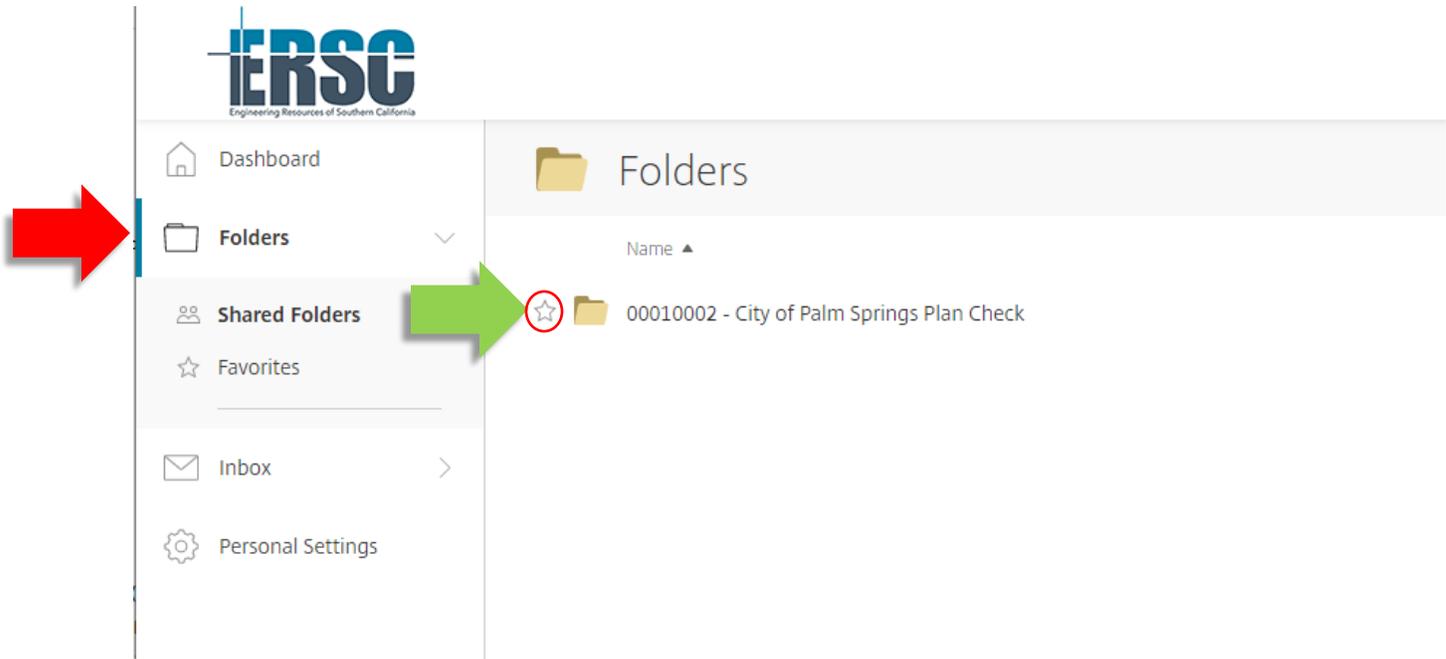
1. Dashboard: The dashboard navigation will take you to the dashboard to quickly access your folders, favorite items, and items that you have recently accessed.
2. Folders: The folders navigation will take you to the folders that you have been given access.
3. Inbox: The inbox navigation will take you to the system mail box for your username.
4. Personal Settings: The personal settings navigation will take you to the area

Next we will discuss the navigating to the project folders.

Client Sharefile Access

B.2 Project Folder Navigation

Folders in the system are accessed by using the “Folders” navigation. Click the Folders navigation to exposed the two options to access as shown in red below:



There will be two available options, Shared Folders and Favorites:

1. Shared Folders: In the shared folders navigation, all folders which you have been granted access will be available. These folders are organized with ERSC’s Client and Project Number with a description of the project as shown next to the green arrow.
2. Favorites: The favorites folder will contain any folder or document that you have designated as such. You can designate any item as a favorite by clicking on the star next to the item. This star is circled in red above.

Once you have navigated to the screen as shown above, find your project folder and click to navigate to the folder.

Client Sharefile Access

When you have selected and navigated to your folder, you will find the different jobs that have been included under the project:

The screenshot shows a file sharing interface. At the top, there is a breadcrumb trail: "Folders > 00010002 - City of Palm Springs Plan Check". Below this, the current folder is displayed as "00010002 - City of Palm Springs Plan Check" with a "More Options" button. A blue plus sign is visible in the top right corner. The main content is a table listing project folders:

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	⋮
<input type="checkbox"/>	☆ 772 - E-4383 THE COLE HOTEL	148 MB	7/1/19	C. BRUDIN	
<input type="checkbox"/>	☆ 773- TAHQUITZ AND SUNRISE MEDICAL CENTER	7 MB	7/1/19	C. BRUDIN	
<input type="checkbox"/>	★ 774- E- 4356 3395 INDIAN CANYON DR	14 MB	7/1/19	C. BRUDIN	
<input type="checkbox"/>	☆ 775- LLA 19-05-0925 925 CORONADO AVE	12 MB	7/1/19	C. BRUDIN	
<input type="checkbox"/>	☆ 776- TM 36691-1	83 MB	7/1/19	C. BRUDIN	
<input type="checkbox"/>	☆ 777 - LLA 19-06-3345 AMBASSADOR DRIVE	28 MB	7/1/19	C. BRUDIN	
<input type="checkbox"/>	☆ 778 - E - 4312 740 PALM AVE	21 MB	7/1/19	C. BRUDIN	
<input type="checkbox"/>	☆ 779 - E - 4313 760 PALM AVE	21 MB	7/1/19	C. BRUDIN	

At the bottom right of the interface, there is a notification setting: "Email me when a file is: Uploaded to this folder".

These jobs are numbered to correspond with ERSC’s job number, the City’s assigned file number, and a short description of the project. Click on your preferred project to navigate to the project’s folders.

Client Sharefile Access

Within the job folder, different folders will be available depending on the size of the submitted project:

Folders > 00010002 - City of Palm Springs Plan Check > 772 - E-4383 THE COLE HOTEL

 772 - E-4383 THE COLE HOTEL  More Options 

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	
<input type="checkbox"/>	  FINAL WQMP	33 MB	7/1/19	C. BRUDIN	
<input type="checkbox"/>	  HYDROLOGY AND HYDRAULIC	11 MB	7/1/19	C. BRUDIN	
<input type="checkbox"/>	  PRECISE GRADING	103 MB	7/1/19	C. BRUDIN	

Email me when a file is: Uploaded to this folder

For this example, a WQMP, Hydrology Study, and Grading Plan are currently being processed. For this example, we will explore the information within the Grading Plan. Click on the desired folder to access the information within the folder:

Folders > 00010002 - City of Palm Springs Plan Check > 772 - E-4383 THE COLE HOTEL > PRECISE GRADING

 PRECISE GRADING  More Options 

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	
<input type="checkbox"/>	  3.0 TRANSMITTALS	103 MB	7/1/19	C. BRUDIN	

Email me when a file is: Uploaded to this folder

Here we can see the transmittals folder. This is where information is stored that is ready for submittal to the Engineer or that is to be received from the Engineer.

Client Sharefile Access

Within the Transmittals folder, you will find separate folders for incoming and outgoing transmittals:

Name	Size	Uploaded	Creator
INCOMING	65 MB	7/1/19	C. BRUDIN
OUTGOING	38 MB	7/1/19	C. BRUDIN

Email me when a file is: Uploaded to this folder

Incoming Folder: Incoming transmittals refer to information that is be transmitted to ERSC from an outside entity.

Outgoing Folder: Outgoing transmittals refer to information that is being transmitted by ERSC to an outside entity.

Click on the folder that corresponds with the information that you are looking to retrieve:

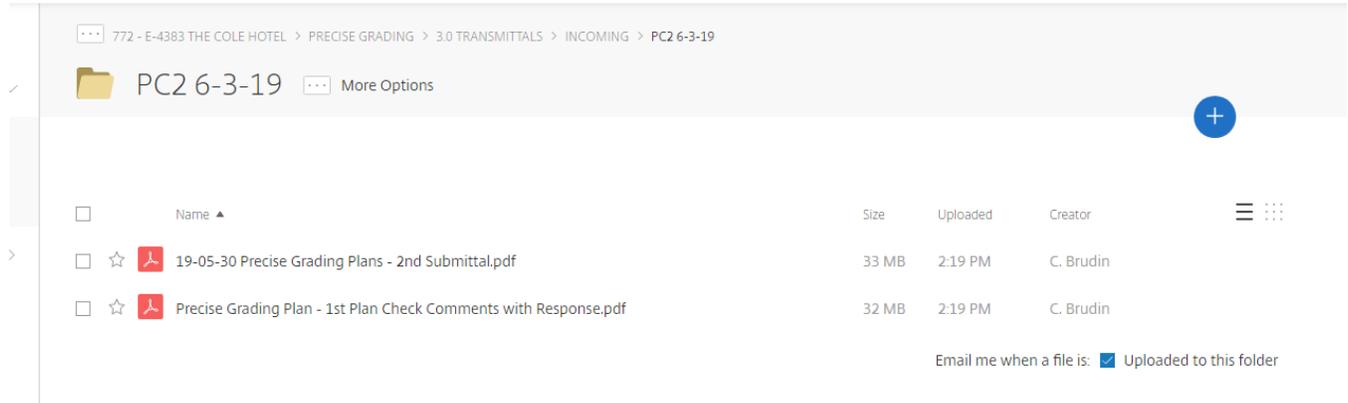
Name	Size	Uploaded	Crea
PC1 4-25-19	235 KB	2:19 PM	C. B
PC2 6-3-19	64 MB	2:19 PM	C. B

Email me when a file

Each transmittal folder, Incoming or Outgoing, will have submittal folders. These will be organized by the submittal number and the date created. Within these folders are the data that has been received or transmitted.

Client Sharefile Access

Information transmitted is typically related to submittal of redline or revised plans, and a comment or response memo outlining the content of the plans:



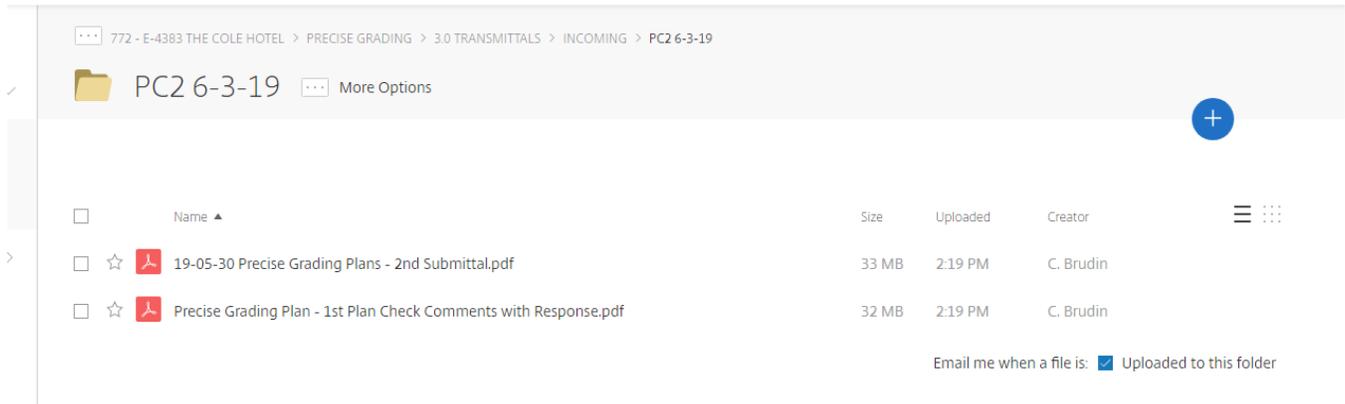
Next we will explore document retrieval and adding information to the system.

Client Sharefile Access

C. Document Retrieval and Submittal

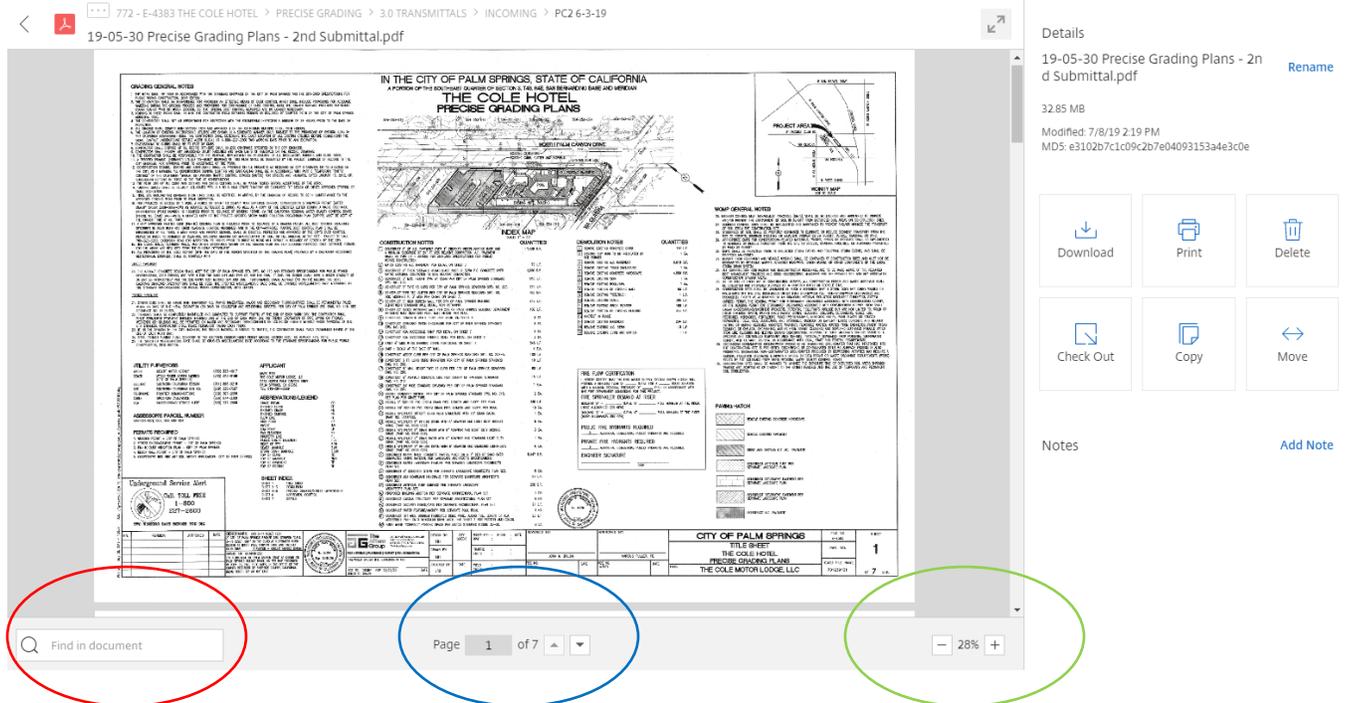
C.1 Document Retrieval

When you are ready to view or retrieve documents from a folder, navigate to the desired job transmittal folder as discussed in the previous section:



Documents can be both downloaded from the system for your use or viewed within the system for quick reference.

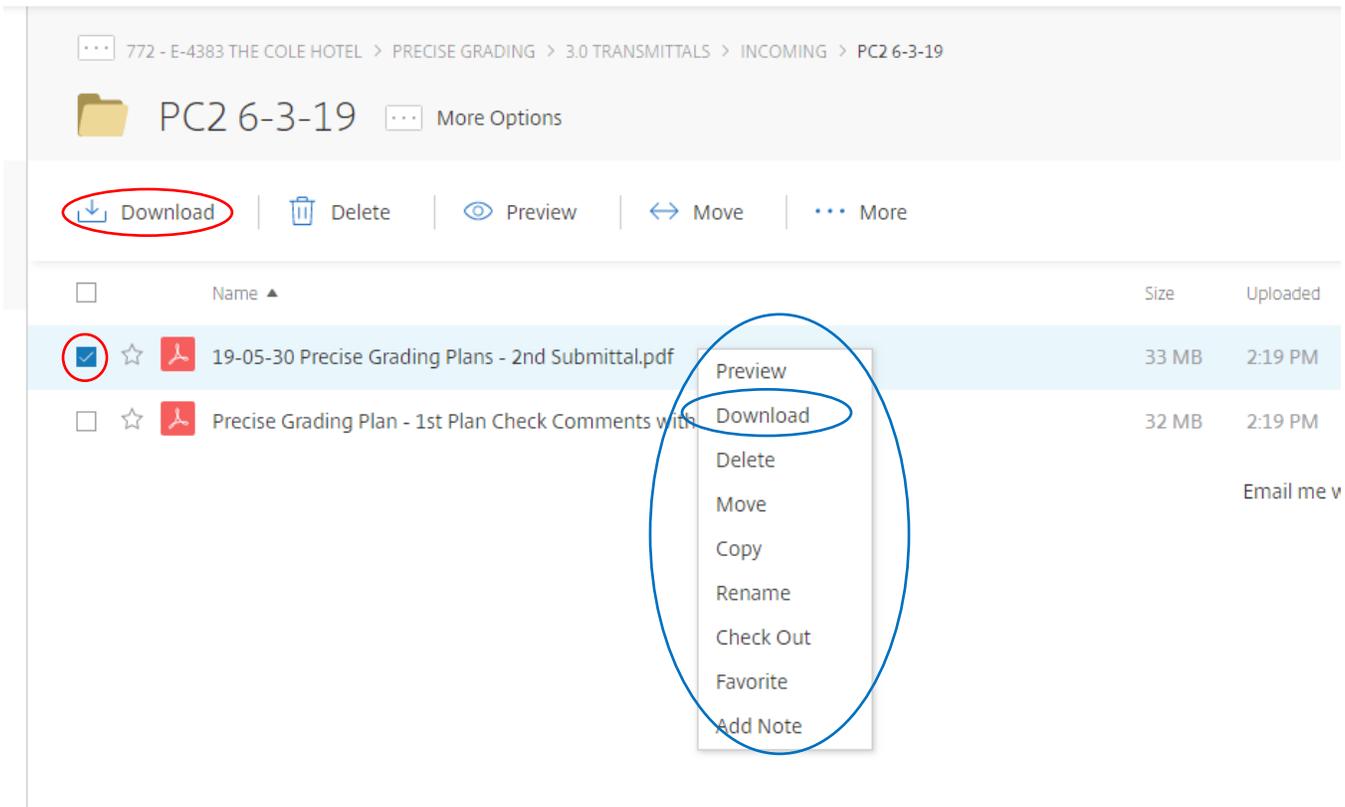
To view a document in the system, all that is required is clicking on the information you would like to view:



You can search information as circled in red, navigate multiple pages as circled in blue, and zoom in/out as circled in green.

Client Sharefile Access

There are multiple ways to download information from the system. When you have navigated to the document you would like to retrieve, you can do one of the following:

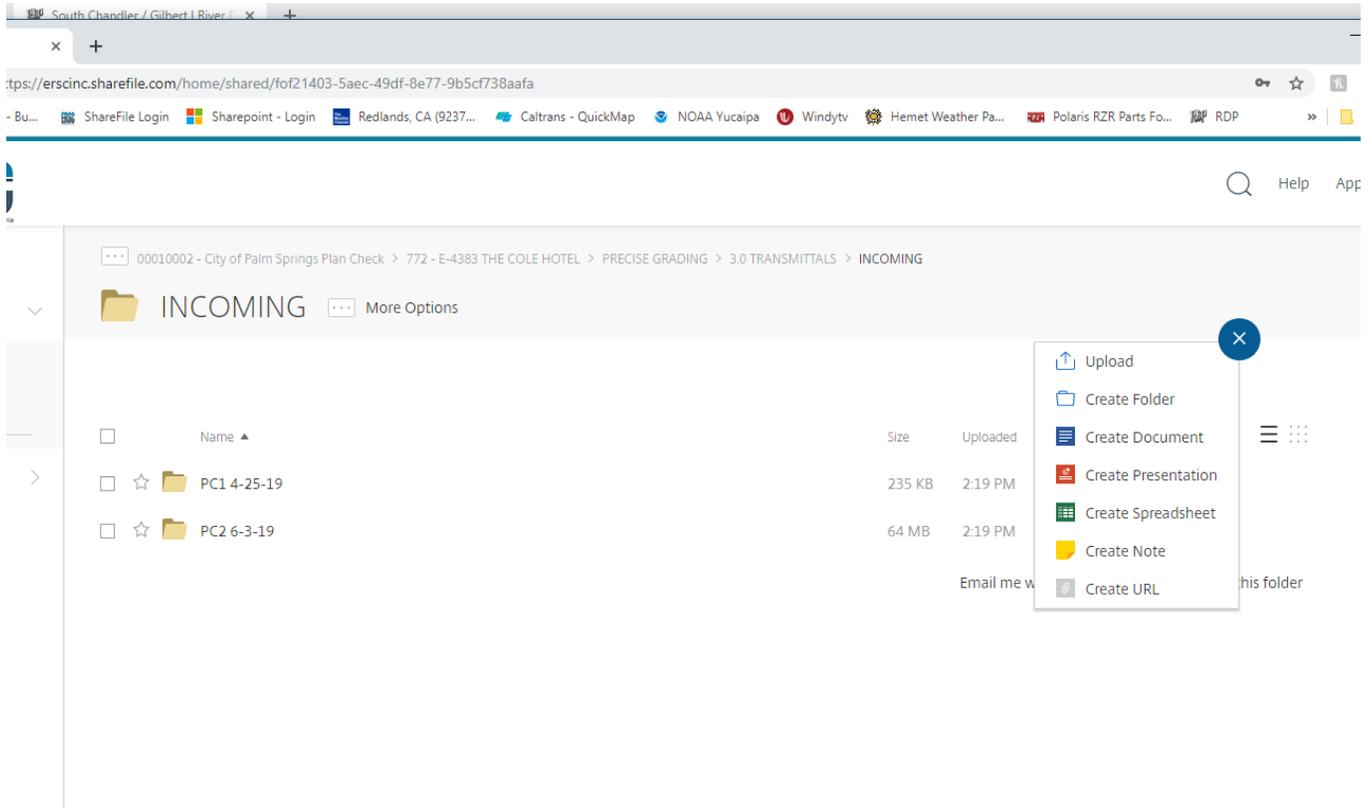


1. Click the box next to the document you would like to retrieve. When highlighted in blue, click the download button at the top of the page to start your download. Steps shown in red circles above.
2. Right-click on the document you would like to retrieve. When the drop-down menu appears, click the Download button to start the download. Steps shown in blue circles above.

Client Sharefile Access

C.2 Document Submittal

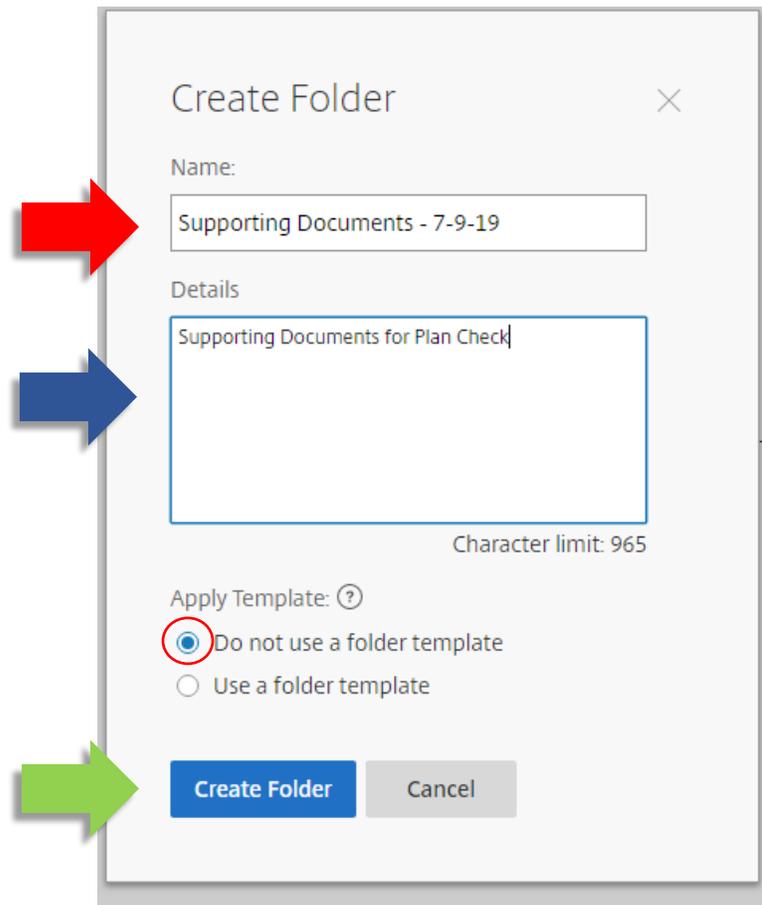
When submitting information, navigate to the desired job transmittal folder as discussed in section B. Remember, information being submitted to ERSC should be in the Incoming folder:



You will need to create a new folder for the information to be submitted. To create a new folder, click the blue button at the right side of the page circled above in red. Then, click the Create Folder button.

Client Sharefile Access

When you click the create folder button, this will prompt a dialogue box to title and describe your folder:



Add your folder title and date as this is required next to the red arrow. Details are optional as show next to the blue arrow. You do not need to use a template as circled in red. Click the blue button to create your folder next to the green arrow:



This folder is empty

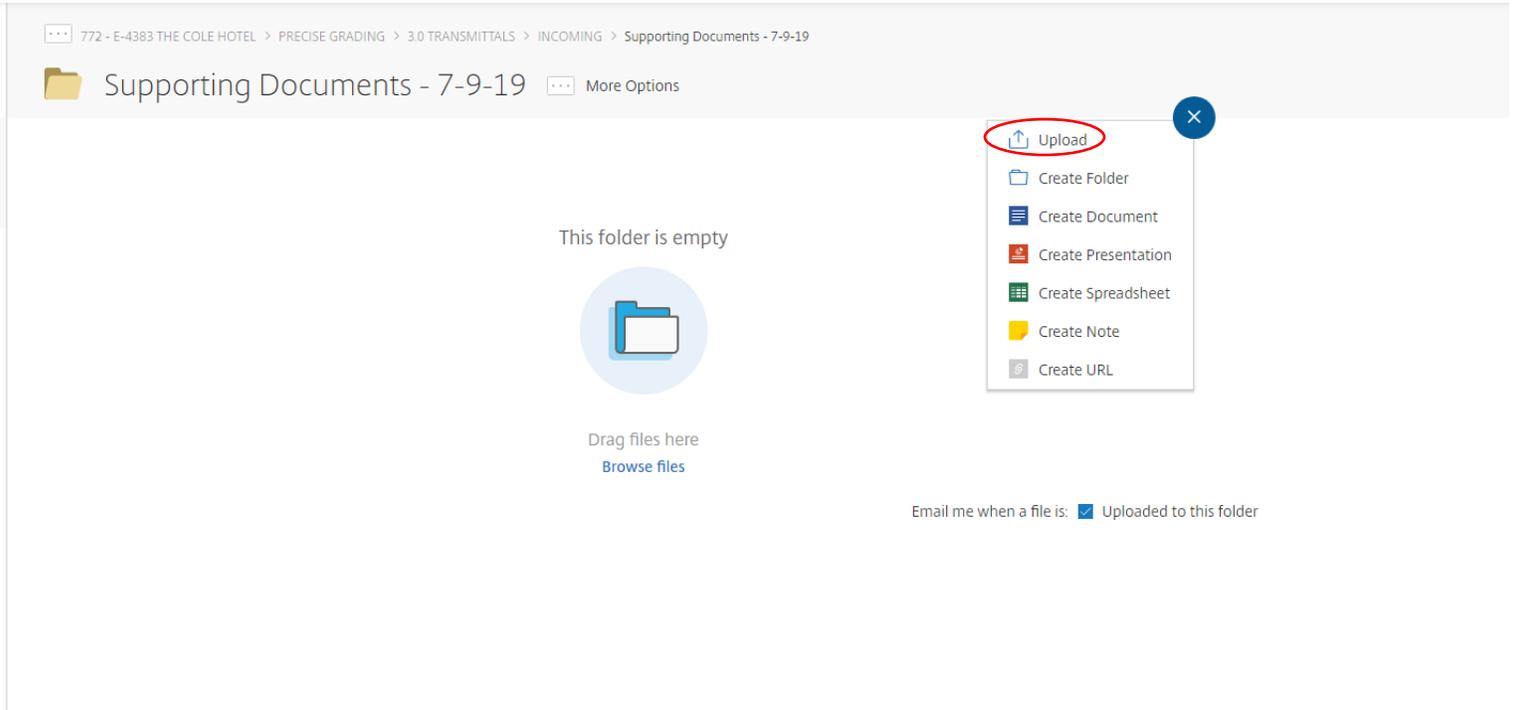


Drag files here
[Browse files](#)

Email me when a file is: Uploaded to this folder

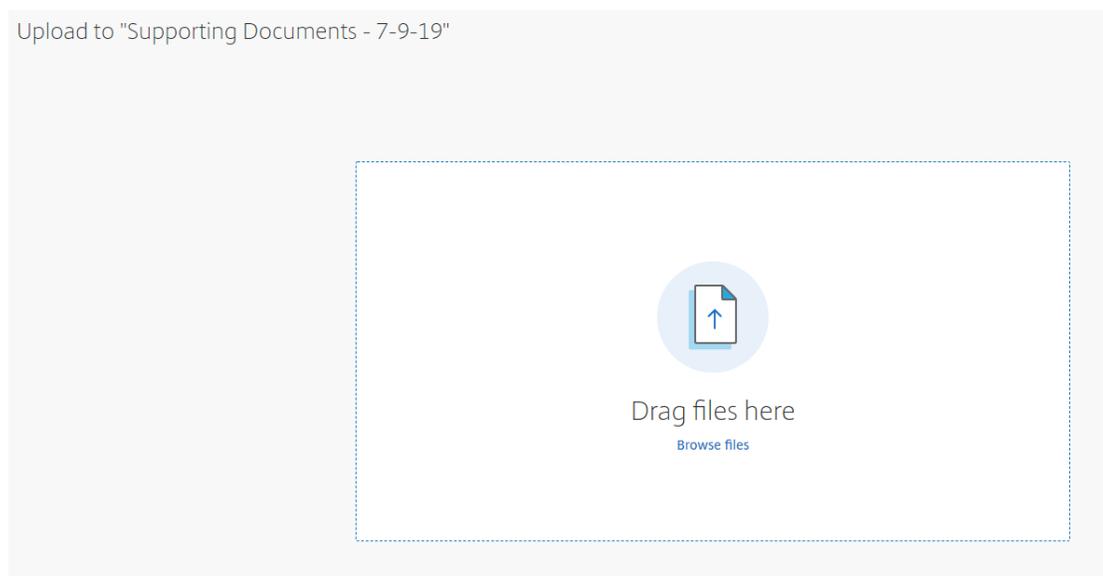
Client Sharefile Access

When your folder is created, you can add documents to your new folder. This can be achieved a few ways:



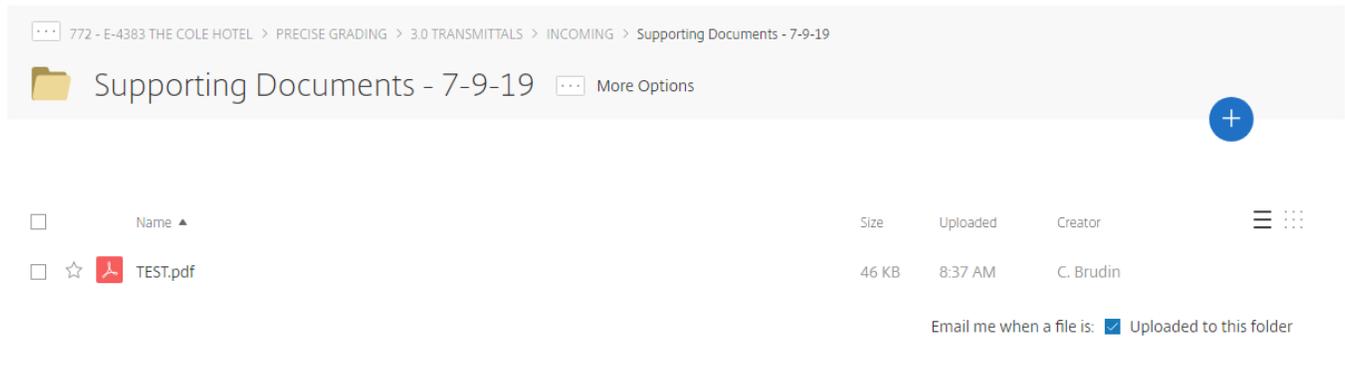
There are three ways to add documents to your new folder:

1. Click and drag is the easiest. Simply select the item you would like to add, and drag into your Sharefile folder to upload.
2. Click the upload button shown circled in red above. This will open the below dialog box to drag files from your directory into the system:



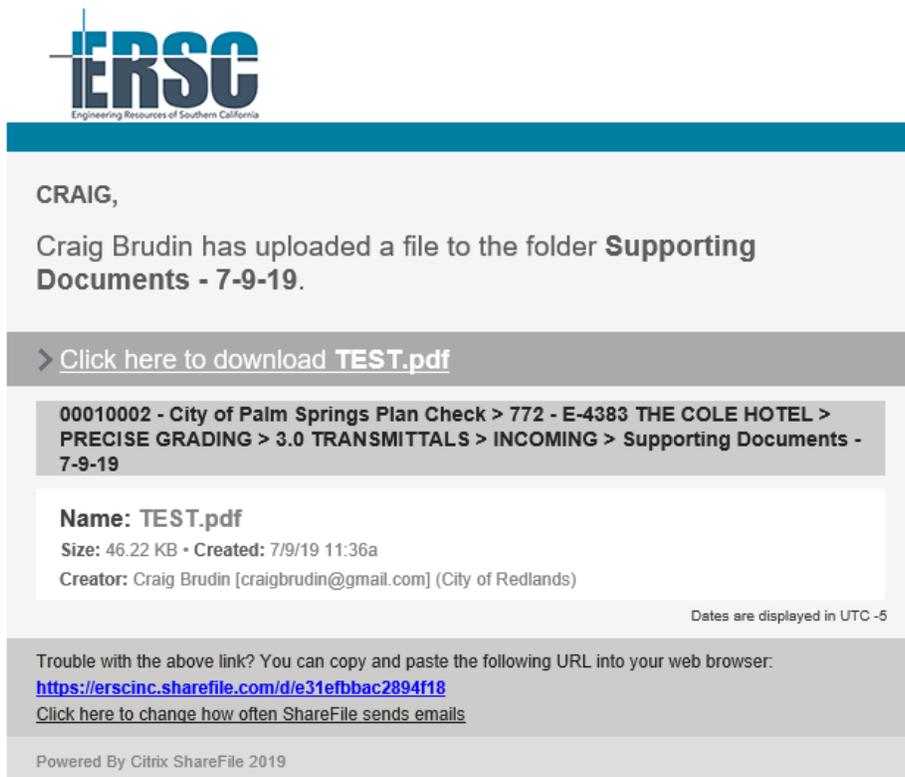
Client Sharefile Access

When you click, drag, and drop into Sharefile the file will automatically begin upload:



The screenshot shows a ShareFile interface. At the top, a breadcrumb trail reads: 772 - E-4383 THE COLE HOTEL > PRECISE GRADING > 3.0 TRANSMITTALS > INCOMING > Supporting Documents - 7-9-19. Below this is a folder icon and the text "Supporting Documents - 7-9-19" with a "More Options" button. A blue plus sign is in the top right corner. Below the folder name is a table with columns: Name, Size, Uploaded, Creator, and a menu icon. One file is listed: "TEST.pdf" with a size of 46 KB, uploaded at 8:37 AM, and created by C. Brudin. At the bottom right, there is a checkbox labeled "Email me when a file is:" which is checked, with the text "Uploaded to this folder" next to it.

When the upload is completed, a notification will be sent to ERSC staff to notify that the upload has been completed:



The screenshot shows an email notification from ERSC (Engineering Resources of Southern California). The header features the ERSC logo. The main body of the email reads: "CRAIG, Craig Brudin has uploaded a file to the folder **Supporting Documents - 7-9-19**." Below this is a link: "> Click here to download TEST.pdf". A detailed file information box follows, containing: "00010002 - City of Palm Springs Plan Check > 772 - E-4383 THE COLE HOTEL > PRECISE GRADING > 3.0 TRANSMITTALS > INCOMING > Supporting Documents - 7-9-19", "Name: TEST.pdf", "Size: 46.22 KB • Created: 7/9/19 11:36a", and "Creator: Craig Brudin [craigbrudin@gmail.com] (City of Redlands)". A note at the bottom right of this box says "Dates are displayed in UTC -5". Below the file information is a link: "Trouble with the above link? You can copy and paste the following URL into your web browser: <https://erscinc.sharefile.com/d/e31efbac2894f18>". At the bottom, there is a link: "Click here to change how often ShareFile sends emails" and a footer: "Powered By Citrix ShareFile 2019".

Next we will cover retrieval of plan check tracking logs.

Client Sharefile Access

C.3 Project Tracking Log

ERSC maintains a tracking log for each project processed for plan review. To view a specific project's tracking log, navigate to the desired project folder as previously described in Section B.2 above.



Shared Folders > 00010002 - City of Palm Springs Plan Check > 772 - E-4383 THE COLE HOTEL

772 - E-4383 THE COLE HOTEL More Options

Items in this Folder People on this Folder

<input type="checkbox"/>	Name ▼
<input type="checkbox"/> ☆	PRECISE GRADING
<input type="checkbox"/> ☆	HYDROLOGY AND HYDRAULIC
<input type="checkbox"/> ☆	FINAL WQMP
<input type="checkbox"/> ☆	XLS 772- TRACKING LOG.xlsx

Email me when a file is:

Click on the Excel file labeled “Tracking Log” next to the Red arrow above to open and view the log.

Client Sharefile Access

When you click the excel file, the tracking log will open as shown below.

Shared Folders > 00010002 - City of Palm Springs Plan Check > 772 - E-4383 THE COLE
772- TRACKING LOG.xlsx

Excel - Read-Only CRAIG BRUDIN

Download Print Share Data ...

Details
772- TRACKING LOG.xlsx Rename
12.96 KB
Modified: 7/30/19 8:27 AM
MD5: b9354d49e15f0adf554936ecc6ffe2e8

Download Email With Citrix... Get A Link
Edit Delete Check Out
Copy Move

Notes Add Note

Phase:	Phase Code:	PC#	IN/INITIALS	OUT/INITIALS	DUE	PC Engineer	QA/QC
HYDROLOGY		1	4/25/2019	5/8/19VB	5/8/19VB	MA	
Approved on:		2	7/25/19vb		8/2/19vb	MA	
By:		3					
		4					
PRECISE GRADING		1	4/25/2019	5/8/19vb	5/8/19vb	JB	
Approved on:		2	6/3/19vb	6/13/19VB	6/13/19vb	JB	
By:		3	7/12/19VB	7/23/19vb	7/23/19VB	JB	
		4					
FINAL WQMP		1	4/25/2019	4/26/19VB	5/8/19vb	SW	
Approved on:		2	7/25/19VB		8/2/19VB	SW	

The tracking log contains information regarding when ERSC receives and submits projects. This sheet represents the entire project, so when multiple documents are submitted for review, they are all shown in the same tracking log. The red, blue and green arrows above show the document type and their corresponding dates.

When a project is approved by ERSC, a date and initials of the approving engineer will be added to the are circled in blue above.

The tracking log can be downloaded to your computer by clicking either download button circled in red above.

Next we will cover notifications for items added to the system.

Client Sharefile Access

D. Notifications

D.1 Upload Notifications

As a client user, you are able to set Sharefile to automatically notify you each time an item is added to a folder. This will allow you to closely follow projects identified as a priority by the City.

It is recommended that you only turn on notifications for the Incoming and Outgoing Folders for specific projects. If you turn on notifications for your entire project, you may receive excessive emails on a daily basis.

First navigate to the project that you would like to receive notifications for as outlined in Section B.2:

The screenshot shows a breadcrumb trail: Folders > 00010002 - City of Palm Springs Plan Check > 772 - E-4383 THE COLE HOTEL > PRECISE GRADING > 3.0 TRANSMITTALS. The folder '3.0 TRANSMITTALS' is circled in blue. Below it is a table of folders:

<input type="checkbox"/>	Name ▲	Size	Uploaded	Creator	
<input type="checkbox"/>	☆ INCOMING	65 MB	7/1/19	C. BRUDIN	
<input type="checkbox"/>	☆ OUTGOING	38 MB	7/1/19	C. BRUDIN	

At the bottom right, there is a notification setting: "Email me when a file is: Uploaded to this folder". This checkbox and its label are circled in red.

Find the box in at the right of the screen circled in red above. Click this box to activate notifications for this folder. Remember, this will notify you each time something is added to the current folder. The current folder is shown above circled in blue.

Client Sharefile Access

Upload notifications will be received via user email in the format shown below:



CRAIG,

Craig Brudin has uploaded a file to the folder **Supporting Documents - 7-9-19**.

 > [Click here to download TEST.pdf](#)

 00010002 - City of Palm Springs Plan Check > 772 - E-4383 THE COLE HOTEL > PRECISE GRADING > 3.0 TRANSMITTALS > INCOMING > Supporting Documents - 7-9-19

Name: TEST.pdf

Size: 46.22 KB • **Created:** 7/9/19 11:36a

Creator: Craig Brudin [craigbrudin@gmail.com] (City of Redlands)

Dates are displayed in UTC -5

Trouble with the above link? You can copy and paste the following URL into your web browser:

<https://erscinc.sharefile.com/d/e31efbbac2894f18>

[Click here to change how often ShareFile sends emails](#)

Powered By Citrix ShareFile 2019

The title of the document is shown in White and can be automatically downloaded by clicking on the white text shown next to the arrow in red. You can also navigate to the folder where the upload was completed by clicking on the link in Black shown next to the blue arrow.