

# Documents

## Document Management in Projects

The Bridge platform includes a built-in document repository for each project. This ensures that all files (plans, permits, photos, invoices, etc.) are tied to the correct job and only accessible to users assigned to that project.

### ☐☐ How Documents Are Tied to a Project

- **Per-Project Libraries:** Every project has its own Documents tab. Files stored here live only within that project and do not appear elsewhere in the system.
- **Folder Hierarchy:** Documents can be organized into folders and sub-folders. A “root” folder is created automatically for each project; you can add additional folders for phases, trades, or document types.
- **Permissions Inherit Project Roles:** Access to a project’s documents is controlled by project roles (e.g., Member, Leader). Users cannot see documents for projects they’re not assigned to.

### ☐☐ Navigating the Documents Tab

- **Grid / List View:** Toggle between a thumbnail grid and a traditional list for easier browsing. Use the “Grid” or “List” buttons in the top toolbar.
- **Breadcrumb Navigation:** A breadcrumb trail appears at the top of the file view (e.g., `Home / Concrete / 2025-11-12`). Click any breadcrumb to jump back to a parent folder.
- **Actions Menu:** The **Actions** button lets you create a new folder, upload files, or perform bulk actions (depending on role permissions).

### ☐☐ Uploading Files

You can add documents to a project in two ways:

1. **Drag & Drop Upload**
  - Simply select files from your computer and drag them into the file area.
  - A drop zone appears, and the upload begins automatically.

- You can drag multiple files at once; upload progress indicators will show status for each file.

## 2. Upload via Actions Menu

- Click the **Actions** button and choose **Upload Files**.
- Select one or more files in the file picker dialog and confirm.

During upload, files are stored in the current folder you're viewing. To upload into a sub-folder, navigate into that folder before dragging the files in.

# 📁 Organizing & Managing Files

- **Create Folder:** Use the **Actions** menu or right-click (if supported) to create a new folder. Name it appropriately (e.g., `Blueprints`, `RFI Responses`).
- **Move / Rename / Delete:** Depending on your permissions, you can drag a file into another folder to move it, or use context actions to rename or delete.
- **File Types:** The system supports common file formats (PDF, DOCX, XLSX, images, etc.). Large files will upload as long as they don't exceed the configured file-size limit.

## ⚙️ Actions Menu Options

Within the Documents tab, an **Actions** button appears in the top-right corner. This menu adapts based on what you have selected and your permissions. Here's what each option does:

Menu Option	When It Appears	What It Does
<b>Upload Files</b>	Always visible	Opens a file-picker so you can choose one or more files from your computer. Files are uploaded into the current folder.
<b>Create folder with [n] selected</b>	Visible when one or more items are selected	Creates a new folder and moves the selected file(s)/folder(s) into it. You'll be prompted to name the new folder. Useful for organizing items after upload.
<b>Rename</b>	When a single file or folder is selected	Allows you to change the name of the selected item. Simply type the new name and confirm.
<b>Move</b>	When one or more items are selected	Opens a dialog to choose a destination folder within the same project. Use this to reorganize files or folders.
<b>Download</b>	When one or more items are selected	Downloads the selected file(s) or folder(s) to your computer. If multiple items are selected, they may be downloaded as a ZIP archive.

Menu Option	When It Appears	What It Does
<b>Delete</b>	When one or more items are selected (and you have permission)	Permanently removes the selected items from the project's document library. A confirmation prompt will ask you to confirm before deletion.

### Notes:

- Options like **Rename**, **Move**, **Download**, and **Delete** are context-sensitive: they only appear when you have selected one or more items in the document list/grid.
- Permissions assigned via project roles determine whether you can see and use these actions. For example, a read-only role may not see **Delete**.
- To select multiple items, use the checkboxes or hold `Ctrl`/`Cmd` (depending on your OS) and click each item.

Including these descriptions will help users understand what each action does and reduce the chance of accidental file movements or deletions.

## □ Best Practices

- **Maintain a Clear Structure:** Use folders for phases or disciplines (e.g., `Framing`, `Electrical`, `Inspections`) so team members can find files quickly.
- **Version Control:** When updating drawings or specs, include version dates in filenames (e.g., `FloorPlan_v2_2025-11-12.pdf`) to avoid confusion.
- **Permissions Checks:** Before inviting external collaborators, review their project role to ensure they have access only to the files they need.

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*By organizing documents within each project and leveraging drag-and-drop uploads, teams can keep plans and records centralized, improving collaboration and reducing the risk of misplaced files.*

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